THE DEVELOPMENT OF AN INTEGRATED INDUCTION PROCESS

In completion of Masters of Philosophy (Industrial Management)

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Abstract

The demand for highly skilled staff and the focus on people as a competitive advantage in organisations has heightened the need for the effective integration of new staff members. This thesis addresses this need in the context of a petro-chemical company which recruited a diverse range of people in different countries.

Using Action Research, Grounded Theory and Systems Thinking the study focused on the development and implementation of an integrated induction learning process to accelerate and assimilate the integration of new staff into the organisation.

The process was designed around the business requirements, while aiming to ensure that the induction process was able to prepare members of staff for the expectations and performance requirements of their role and developing a skill-base to meet these and future requirements where possible.

To this end, an integrated induction learning process was developed for the organisation focusing on; the development of the appropriate learning and change skills to ensure the ability to manage the changing work environment, the behaviours and knowledge required for the current position the staff member will hold and the underpinning learning skills enable them to adapt to the changes in their role and the organisation itself.

The induction process was implemented in the organisation with the feedback from the learners emphasising the impact that the process had on their lives and performance. The action research process meant a constant refinement of the induction process, allowing for the feedback to constantly inform the design in iterations of action-reflection. The constant positive feedback from the learners emphasised the impact that the process was achieving in their work, in terms of their understanding and capacity, but also their ability to achieve optimal performance and meet the operational requirements of their position and potential future positions in the organisation.

As a result, the process emphasised that an integrated induction learning process can accelerate the assimilation of new staff members into the organisation and assist the new member of staff in meeting of the minimum operating practices.

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iv) Confidentiality Statement

This research thesis and process document events in an organisation that have requested to remain anonymous due to the nature of some of the content and organisational data. Permission for this process was given with this proviso and has been respected. As a result, the organisation in question has been described as The Company.

v) Declaration

This thesis contains no material which has been accepted for the award of any other degree or diploma in any university, and, to the best of my knowledge and belief, neither does it contain material previously published or written by another person, except where due acknowledgement is made in the text.

Signed: Signed by candidate

Sean Andrew Greathead

Date: 30/11/06

vi) Acknowledgements

It has been a long journey to finish this research and a number of people have provided support, encouragement and help:

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- To my family and friends, I now have some free time, scary concept.
- To Corrinne Shaw, who has provided direction and supervision, thank you for your support.

Chapter 1: Introduction

The modern corporate world is ever changing and increasingly complex. In today's context, change drives activity and performance. In this context, *'knowledge is the new battlefield for countries, corporations and individuals'* (Ridderstråle & Nordström, 2000: 21) and staff who can manage this information are seen as the soldiers. This is resulting is an increasing demand for highly skilled staff who are highly prized and sought after. David Ogilvy has been on record as saying *'the people with the best people win'* (Gray, 2004). In other words, in organisations, people provide business with the strategic competitive advantage.

Newcomers to an organisation find the transition into the new organisation difficult (Meighan, 2000). The objective of this research is to develop a process to integrate new staff members into the organisation. Such a process is referred to as induction, onboarding, orientation or even indoctrination and assists the new staff member with this transition.

There are a number of practical concerns regarding the integration of new staff members. The process is expected to meet the operational requirements of the organisation and not to interfere with the ability of the organisation to function. Simply put, the practical concern is how to assist new employees to become fully competent within the shortest possible time. Therefore, an induction process would be required to allow the individual employee the opportunity to become fully productive as quickly as possible. *'Employers want optimum productivity as early as possible. Employees want to turn uncertainty into certainty and become part of the organisation'* (Brody, 1986: 25). Walmart, one of the biggest companies in the world, discovered from their internal research that there is a link between orientation and employee turnover (Klienman, 2000). People stay in an organisation if they feel valued. The best time to start making them feel that way is when they begin the employment relationship.

In order to ensure the success of a new individual in the organisation an effective and efficient induction process needs to be in place. Such a process must prepare the individual for achieving success and meeting their performance requirements as soon as possible. This research examines the induction process and is broken down into the following chapters:

- **Introducing the Context (Page 3):** This chapter examines the research situation and provides a picture of the situation in which the research takes place.

- **Formulating the Problem (Page 5):** The chapter presents the current situation and context and enquires as to what would solve this challenge given the specific context. It also presents the research problem and research question.
- **Conceptual and Theoretical Framework (Page 12):** This chapter continues with the discussion into the methodological approach adopted and examines action research and how it is implemented. The overall grounded theory methodology is also discussed. The theoretical and conceptual section discusses learning theory and begins to examine how this theory affects and impacts on the induction process. Induction theory is explored, presenting other induction models also available. In addition, this chapter presents the justification for the answer. The chapter explores the philosophical foundation of this research. The philosophical perspective examines the fundamental assumptions and worldview of this research. These assumptions include areas such as how learning is developed and knowledge created and the use of systemic view of the organisation.
- **Methodology (Page 49):** The inquiry framework details the methodology used in the research and the justification for using this methodology.
- **Application (Page 61):** In this chapter the output of the implementation of the action research model is detailed, describing the events in the research process. At the end of this chapter the detailed induction model developed during this research is presented. The model argues that through an organisational focused and learner driven induction process, new employees are integrated into the organisation at a faster rate to be more productive and efficient in the new position. This statement that is seen to answer the research question.
- **Evaluation (Page 95):** The evaluation process considers the complexity of the process, while examining the relevance, validity, utility and ethics of the project as a whole. The evaluation also considers the impact of the project on the organisation and the future of this process. In addition, the chapter examines at the constraints and challenges of the research, as well as the process challenges faced in the research.

Chapter 2: Introducing the Context

The focus of this chapter is the context of the research; including both the organisation context and external considerations. The situation informs the reader as to the location of the research, the nature of the organisation and the external environment in which the organisation and the research reside.

The research occurs in the context of an organisation described in this research as The Company. The Company is a large multinational in the chemical and petro-chemical industries. It is a business with interests around the world, including Southern Africa as well as the rest of Africa. At the time of this study, the Company was growing as a business, with expansion in Southern Africa and into the rest of Africa and new staff members were joining on a regular basis. The company acknowledged that their staff turnover was higher than the industry. The HR department position turnover at the level of 20% for middle management and administration, whereas the industry was around 10%.

At the start of the research project, the approach to addressing the new arrival of staff was through a presentation style induction and orientation programme. This programme was heavily subscribed, and started in the late 90's and for three years. Nothing had been in place at The Company prior to this for a period of at least three years.

2.1. Initial Observations

The introduction of a new member of staff into an organisation is an event that has an impact on both the organisation and the individual. This impact changes the status quo as the new individual changes things within the organisation and a degree of equilibrium needs to be established. This equilibrium is the manner in which the new employee relates to the organisation and the other people therein, as well as how the organisation relates to the new employee. The need for this equilibrium to the benefit of both parties; forms the concern in this research process.

At the start of the research project, the induction programme being presented was designed in response to requests from the new employees and managers who were struggling to integrate into the organisation. This programme had been put together as an ad hoc process that used presentations and Company site visits. The process consisted of a two-day workshop with the first day consisting of presentations from

Heads of Departments or Departmental Representatives in a lecture style and displaying content based on what each presenter felt was most important. The second day was spent on tours of two key areas of the business and allowed newcomers the opportunity to see and understand these areas. There was general agreement among the participants that the presentations at times were outdated and contradictory. Some participants even suggested that 'they would catch up on their sleep'.

The Learning Department, (a department in The Company), had the responsibility to oversee learning for the organisation. The Learning Department were responsible for the induction process, received feedback from the new employees and managers, emphasising that although there was a need for induction, improvements could be made to the programme. The feedback regarding the current programme was that it did not adequately prepare new employees for their role or give them the required understanding of the business. This began the investigation into the current situation.

Chapter 3: Formulating the Problem

This chapter considers the concerns that the organisation expresses which leads to the research question. This includes the project scoping with the various stakeholders and the relationship between the organisation and the consultants. Following the initial assessment of the context, a causal loop is developed as a research tool that outlines the nature of the concern. This forms the foundation for addressing the problem.

3.1. Evaluation of Current Situation

3.1.1. Stakeholder Interviews

The data gathering and research process into the current situation was achieved by interviewing a number of the various stakeholders. Namely:

- Members of staff who were employed three months prior to the initial study, who had attended the original induction programme.
- Members of staff who were employed three months prior to the initial study, who had not attended the original induction programme.
- A selection of Line Managers both new and experienced, from within and outside the South African management structure.

A list of the interview questions can be found in Appendix C.1. List of Interview Questions (Page 135). Additional sample data can be found in C.2. List of Initial Individuals Interviewed (Page 137) and C.3. Sample of Interview Data (Page 138).

3.1.2. The Joint Requirements and Action Research Workshop

The workshop allowed for the stakeholders to detail what was expected from the various parties involved, outlining an agreement of the induction process and developed an action plan for the stakeholders. The workshop feedback and presentation can be found in C.4. Feedback Sessions: Interview Feedback Sessions & Project Scoping (Page 152).

The feedback from the interviews and stakeholder workshop highlighted the following problems:

- The challenge of gathering the Heads Of Departments to present to the inductees. These presentations were often out of date, in conflict with one another, inappropriate, repeated, constantly changing and difficult to follow.
- The inductees were not able to respond to the information presented due to the approach used to present the information and the inconsistency of the content; the inductees were not able to evaluate this information.

- The inductees were not exposed to information seen as critically important by the Company as a whole, but rather what was important to the presenters themselves.
- The process was not improving or reducing the time taken for new staff members to become more competent in their new positions. This was a perception voiced by the inductees themselves and their line managers. It is not a quantifiable measure, but is based on a self-assessment during the evaluation process. The line managers measured the competence against the individual's performance contract and job description. The view of the line managers as to the acceptable level of competence varied, but could be generalised to a level where the employee could perform his or her position to an approximate performance level of 80% without assistance (The range was 60% - 90%. 80% was the most common level).
- There was increasing operational pressure from line managers as some staff had failed to meet the Company values and operating principles and this had resulted in four or five unsatisfactory incidents.

Additional challenges that were identified that added to the organisation's need for building skills of new staff, these included:

- The Company was experiencing dramatic changes, both in terms of the industry and the competitive environment, as well as within the Company's national, intra-continental and international structures.
- The local business environment presented issues of Black Economic Empowerment and Affirmative Action are also challenges that the Company was facing.

These issues were raised through the interview process.

3.2. The Casual Loop

These challenges were analysed to examine the key driving factors and outcomes that the organisation faced within this context. These are presented in a casual loop diagram detailed in Figure 1: (Causal Loop Diagram of issues relating to the initial induction process (Reinforcing)).

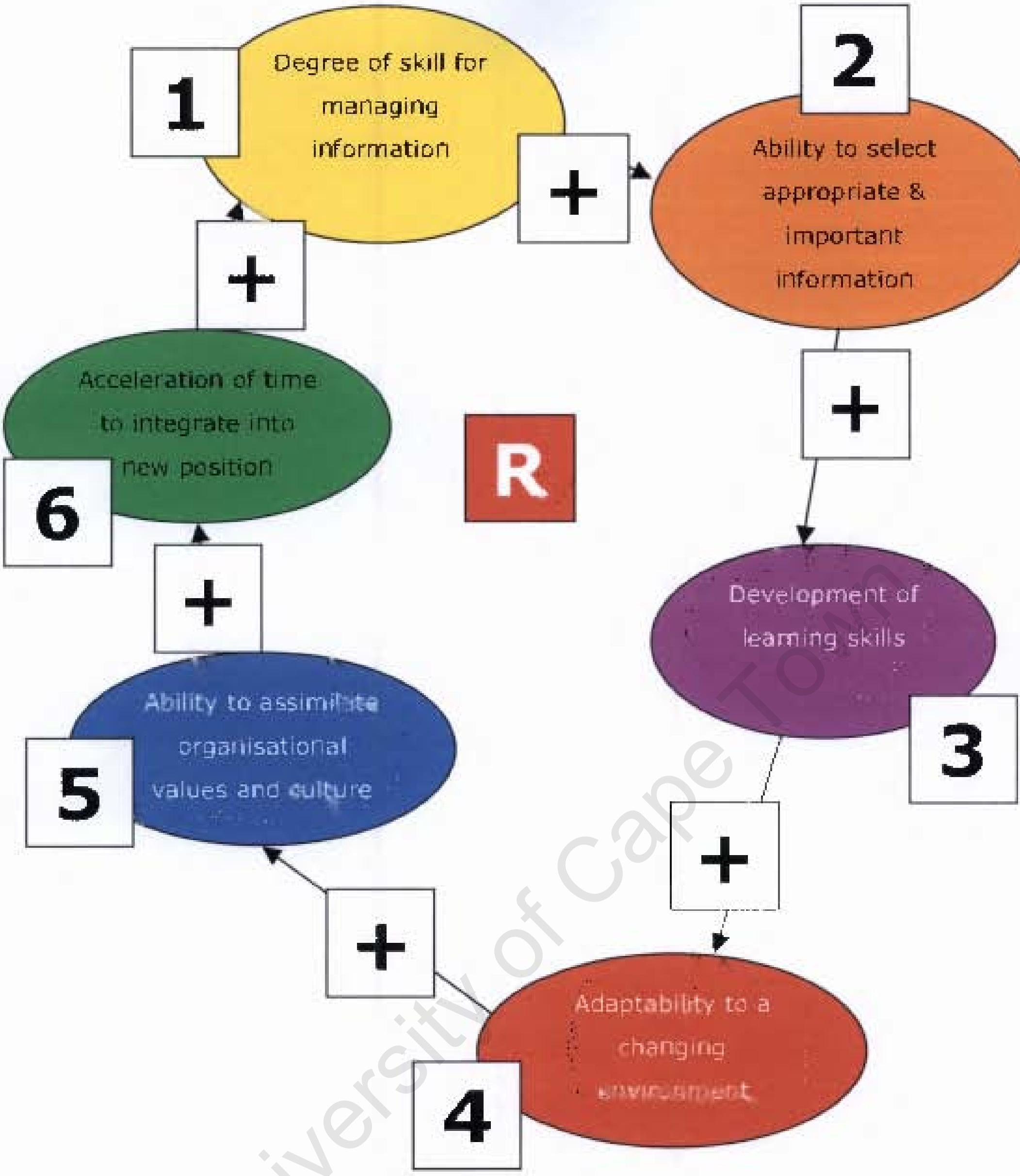


Figure 1: Causal Loop Diagram of issues relating to the initial induction process (Reinforcing)

3.2.1. Relationship between the variables

The relationship between the variables provides the foundation for the causal loop. However, it is important to detail these variables:

a) Relationship between 'Degree of skill for managing information' and 'Ability to select appropriate and important information'

The *'degree of skill for managing information'* focuses on the skill of the individual to manage the information he or she receives throughout the employee's working life. The information load in the early working experience in a new organisation is much higher. It is important to consider that information is received through social interaction (Blumer, 1969) and is used to organize the new employee's behaviour (Blumer, 1969).

This information is communicated both actively, (meetings, telephone calls, emails, etc) or passively, (internet websites, pamphlets, etc). The communication is between individuals, *'who receive messages, interpret them, define the situation, anticipate how others will act, formulate plans, make decisions to act, receive new information, and revise their plans'* (Blumer, 1969: 1). This outlines the source and purpose of the information; which then impacts on the individual.

The improvement and development of the skill for managing information, in whatever form the information is available, means an increase in the ability to choose the appropriate information that can be received. This occurs as the individual gains the ability to manage, discern and filter this information through the development of the capability to select and evaluation the information presented or available.

b) Relationship between 'Ability to select appropriate and important information' and 'Development of learning skills'

The ability of an individual to select the appropriate and important information forms part of his or her learning skills. This refers to the premise that learning is greater than the knowledge itself, but is built on the premise of integration and application of information into the world of the learner (Von Hirschfeld, 1991). Bereiter and Scardamalia (1998) suggest that the issue of learning is not based on the type of knowledge but rather the lack thereof. Constructivist theorists build on the premise that knowledge is built or constructed and that there is skill and capability required to perform such a construction. As a result, there is a relationship between the ability to select the information and learning skills.

c) Relationship between 'Development of learning skills' and 'Adaptability to a changing environment'

Learning skills refer directly to the skill in assimilating and acquiring information, both new and known. However, learning has a social dynamic as learning is a social activity and results in change in both the individual and the community in which he or she interacts (Packer & Goicoechea, 2000, & Ackermann, 1996). Learning has a broader impact in the change of the learner's behaviour (Packer & Goicoechea , 2000). The impact of learning is therefore a change in the individual. The greater the ability for the individual to change and learn increases the capability of the individual to adapt to change around him or her. This is because he or she is able to learn effectively about this changed environment and hence adapt his or her behaviour and understanding to engage in this environment.

d) Relationship between 'Adaptability to a changing environment' and 'Ability to assimilate organisational values and culture'

Adaptability to a changing environment is a skill that requires that the individual be able to manage or handle the context in which they find him or herself. The challenge is that this context maybe unfamiliar and therefore the individual is required to adapt or change. Bredo states that *'Individual change, or learning, is considered to be inseparable from change in the social relationships in which people participant'* (1994: 32). In order for an individual to change and adapt to an organisation, he or she is required to adapt and assimilate the social context of the situation. Blumer states that culture, *'whether defined as custom, tradition, norm, value, rules, or such like, is clearly derived from what people do'* (Blumer, 1986: 8). When an individual engages in an environment where 'people do things differently', the individual needs to adapt in order function appropriately in this new environment and understand the culture therein. This requires the adaptability of the individual to deal with a changing environment. An increase in such a skill means an increase in the ability of the individual to meet the organisational values and culture.

e) Relationship between 'Ability to assimilate organisational values and culture' and 'Acceleration of time to integrate into new position'

The ability of the individual to meet the organisational values and culture means that he or she can fully integrate into the organisation. They will have the capability and skill to learn the 'organisational language', such as acronyms and specific terminology (either organisational or industry specific). The individual will understand 'how things are done around here' and as a result, he or she will be able to integrate into the organisation at a much faster rate.

f) Relationship between 'Acceleration of time to integrate into new position' and 'Degree of skill for managing information'

As the new employee is integrated into their position, he or she is able to practice their skill for managing information as the information flow increases with their development in their new position. This increased integration results in the improvement in the new employee's skill base.

3.2.2. Reinforcing Causal Loop

The overall result of this causal loop process is the creation of positive, increasing and reinforcing loop. The reinforcing nature of causal loops allows for the compounding and the acceleration of the change, as it is exponential. However, without the appropriate positive process, a negative reinforcement can occur, as in the case of this context. This forms the hypothesis of this research, which is developed into the research problem.

3.2.3. The Casual Loop Story and Relationship

The Causal Loop diagram develops into the story of the situation and concern in the organisation. The story is outlines as follows:
Employees arrive at the organisation and require **skills for managing information** as the new environment comes with a large volume of new information and challenges. With this skill, the employee is able to develop their **ability to select appropriate and important information**.

This ability forms the basis of the learning skills required to manage the information. Therefore, the **development of learning skills** assists the new employee to **adapt to a changing environment**. The environment is variable as it changes with the arrival of new employees and with the changing external environment.

As the organisation changes and adjusts, employees adapt. The adaptation of the individual employee means that the employee has the **ability to meet organisational values and culture**.

Through the **meeting of organisational values and culture**, the employee should **improve the time to integrate into the new position**. This integration also develops the employee's **degree of skill for managing information** as he or she is exposed to more information that he or she is able to manage.

The nature of the relationships between the variables results in the causal loop being positively reinforcing and therefore, change can occur through the appropriate intervention in the variables documented.

3.2.4. Research Question

Given the causal loop and the context, the consultants on the project and later the problem holder (Head of the Learning Department) agreed the problem areas in the induction of new staff. Given this consideration and the impact of the causal loop, and in discussion with the problem holder, the problem was phrased as the research question:
How can the Company accelerate the assimilation of new staff members into the organisation through an integrated induction learning processes, ensuring the meeting of minimum operating practices? If so, what process would be most effective in the context of the Company?
The stakeholders agreed that the Casual Loop represented the interaction of variables contributing to the problem and the overall objective of this research project is to ascertain the answer to the above problem statement that can be effectively implemented in the organisation.

3.3. Conclusion

The chapter focused on the presentation of the concern, which drives the research. The concerns were investigated through participation of the various stakeholders and ending with the overall evaluation of the situation. This facilitated the development of the causal loop diagram, which examined the situation and provided an understanding of the complexity. The causal loop allowed for a focusing of the problem area and the development of a problem statement to be examined in this research process.

Chapter 4: Conceptual and Theoretical Framework

This chapter presents a discussion on learning and induction theory within the context of the philosophical framework. This forms the conceptual and theoretical framework essentially derived from literature and practice. Learning Theory is an examination of the assumptions and theories of learning, more specifically in the context of this research process. Induction Theory is an examination of the theoretical perspectives of induction. In addition, the philosophical framework provides the boundaries of the inquiry process.

4.1. Learning Theory

The examination of learning and the assumptions therein begins with the discussion of the definition of learning. The section continues with the exploration of learning and its relationship with knowledge and the understanding required to integrate and apply this knowledge in an organisation. The theoretical and philosophical boundary of learning in this research is constructivist. Within this framework, the concepts of 'learning as a skill' and 'how learning occurs', are discussed. The understanding of how knowledge is constructed is also considered. Such knowledge construction is seen as an active process and is examined using the Constructivist View of Learning as a model. The concept of 'learning as a social activity' is explored; with the consideration that learning occurs in a collective of individuals rather than in isolation. This view is expanded to consider other roles in learning and the impact of these roles, as well as that of the learning environment. The subject of who has the responsibility for learning is discussed.

4.1.1. Perspectives and Descriptions of Learning

There are a broad range of perspectives and definitions of learning. The perspectives on learning range from Behaviorism, Cognitivism through to Constructivism. This research does not discuss the various theories, but rather examines the view of adult learning within the boundaries of Constructivist Theory.

The 'father of adult learning', Malcolm Knowles, uses a number of different descriptions of learning and acknowledges that there is no simple or elegant description either. Each perspective is based on the frame of reference in context (Knowles, 1990). Because of this challenge, the description of learning below is based on the philosophical assumptions made for this research. It was Lave and Wenger, who state that *'All theories of learning are based on fundamental assumptions about the person, the world, and their relations...'* (1991: 47).

4.1.2. Constructivist View of Learning

Constructivism is a philosophical position with the perspective that humans construct knowledge as apposed to discovering it. Gunstone (1994: 132) describes *'constructivism to mean that the learner constructs his/her own understanding from the totality of the experiences which he/she sees as relevant to the concept, belief, skill etc. being considered'*. In examining the constructivist view of learning, the following claims are made:

- *'Learning is an active process*
- *Knowledge is constructed, rather than innate, or passively absorbed*
- *All knowledge is personal and idiosyncratic and is socially constructed*
- *Learning is essentially a process of making sense of the world*
- *Effective learning requires meaningful, open-ended, challenging problems for the learner to solve'.*

(Fox, 2001: 24, Spigner–Littles et al., 1999) Each of these claims of the constructivist view of learning are explored below:

a) Learning as an active process

In the constructivist view of learning, learning is seen as an active process (Fox, 2001, Packer and Goicoechea , 2000 & Ackermann, 1996 & Kivinen & Ristela, 2003). This activity involves *'interacting with the environment'* (Packer & Goicoechea , 2000: 227) and *'acting upon the world'* (Fox, 2001: 24). In addition, individuals learn from being *'acted upon'* (Fox, 2001) and as individuals have developed a reactive style of learning in addition to the constructivist active philosophy. Posner, Strike, Hewson and Gertzog (1982) argued that the learning process is fundamentally about conceptual change. They suggest that the learner achieves one of the following, exchanging concepts, restructuring existing concepts or the capturing of new concepts.

Candy (1991: 272 cited by Case 2000: 10 & Gravett & Nenning 1998: 10) highlights two areas of focus for the Constructivist view of Learning, namely; *'how learners construe (or interpret) events and ideas, and how they construct (build or assemble) structures of meaning'.* Because learning is an active process there is an interrelationship between the building a system of meanings used to interpret scenarios and situations and understanding thereof, and feedback of the effect on this system (Case, 2000). The consequence of this claim is that learning is actively undertaken, where learning is constantly evaluated and discussed and not merely assumed to have taken place.

b) Knowledge is constructed, rather than innate, or passively absorbed

Fox (2001: 24-25, supported by Kivinen & Ristela, 2003, Ackermann, 1996 & Papert, 1996) states the Constructivist view of learning is *'Knowledge is Constructed, Rather than Innate, or Passively Absorbed'.* This statement emphasises that activity is required for learning to take place and that learning does not take place by chance or by merely being present when information is being presented. This is the second claim is the individual constructs his or her own knowledge and understanding.

Construction of knowledge would entail the individual continually structuring and restructuring experiences through self-regulated mental activity (Spigner–Littles and Anderson, 1999: 205 & Fox, 2001: 26) actively making sense of ideas and concepts in their own minds (Case, 2000). Therefore, in order for individuals to learn, they require the building blocks to construct the knowledge they seek.

c) All knowledge is personal and idiosyncratic and is socially constructed

Given that learning is a construction of knowledge and understanding, it is seen to take place in a social context and does not occur in isolation. Packer and Goicoechea , (2000: 228) takes the understanding of learning in this context further and suggests that learning should *'not only be viewed as becoming a member of a community', 'not only constructing knowledge at various levels of expertise'* but including *'taking a stand on the culture of one's community…'.* Packer and Goicoechea offer the perspective that learning requires a transformation of both the individual and social environment (2000). This reinforces the view that learning occurs through the interaction between self and others.

Constructivist thinking has developed into two broad areas, specifically an individual area that focuses on the learner's active role; as detailed above and social area that emphasises the importance of the collective (namely, culture, language, etc.) (Driver, Asoko, Leach, Mortimer & Scott, 1996). Such an experience can be maximised through learning as a collective. Spigner–Littles et al. (1999: 208) suggest that *'cooperative learning …enhances subject relevancy and encourages [learners] as members of small teams to actively assist one another in learning, has been a highly effective instructional technique…'.* This further emphases the role of the collective in the learner's experience.

Constructivist thinking refers to 'communities of practice' in which learning occurs and learners participate (Packer & Goicoechea, 2000). It is thus assumed that learning occurs within the context of social activity, which occurs within the context of the organisation or collective. Packer and Goicoechea (2000: 229) state that learning is *'an integral part of generative social practice in the lived-in world'* (Lave & Wenger, 1991: 35). This emphases the role of social engagement in learning and in essence, learning is a social activity. Lave states that *'learning, viewed as socially situated activity, must be grounded in a social ontology that conceives of the person as an acting being, engaged in activity in the world'* (1992 cited by Packer & Goicoechea , 2000: 229). The interaction within groups develops creative thinking and offers a social laboratory that provides an opportunity to practice, explore and develop social norms and rules (Spigner-Littles et al., 1999 & Kelly, 1963). Lave (1996) views learning as both a collective event and social activity.

Packer and Goicoechea (2000) suggests that within a social environment, there is an 'enculturation' process in learning. Enculturation is defined as the *'picking up the jargon, behaviour, and norms of a new social group; adopting its belief systems to become a member of the culture'.* (Packer & Goicoechea, 2000: 229). Therefore, in any new environment, there is a process to engage the social framework in order to facilitate the learning of the individual learner.

An area for debate is whether, in the context of this research, the learners are treated as individuals or as a collective of learners. In this research, the learners are seen as individuals. These individuals also form a collective group, which engages the system, both the organisation and it's parts. These statements may appear to be in contradiction. Rather they should be viewed with the perspective that the learning focus is on the learners as individuals; whereas in the systems theory perspective, the system engages the learners as a collective. It is important to recognise that the issue of engagement between the individual and the collective also occurs within the group of learners. The manner in which this engagement occurs is part of the learning design of the induction process. This is the consequence of the constructivist learning claim, that learning is a social activity, with each individual learning a different and personal knowledge.

d) Learning is essentially a process of making sense of the world

Learning involves engaging knowledge in an active process to gain an understanding of the world around the learner. Constructivist learning theory asserts that understanding can only be achieved when the learner engages in the construction of their own knowledge and that the construction *'occurs through mental reflections that aim to structure and organise knowledge into various connected ideas and concepts'* (Fast, 1999: 230). Constructivism *'is premised on the belief that learners actively create, interpret and reorganise knowledge in individual ways'* (Windschitl, 1999: 752). This means that learning is an activity rather than an event that directly involves the learner and is driven by his or her needs and actions. Learning, therefore, occurs through the active construction process involving the individual.

Given this central claim, it is therefore argued that learning is fundamentally an epistemological issue. Lave (1996: 156) argues that it is *'about knowing, acquiring knowledge, belief, skills, changing the mind, moving from intuition to rules, or the reverse.'* Furthermore, given that learning is making sense of the world, then learning is the integration and application of information in making sense of the world. The complexities and nuances of information and knowledge form part of this perspective. Kivinen and Ristela cite Bereiter, and Bereiter and Scardamalia who suggest that *'from the learner's point of view, there is not much difference between creating new theories and explanations or understanding established ones'* (1994 & 1998, pp. 494, 504 respectively in 2003: 369).

Therefore in order for a learner to make sense of the world around them, they need to integrate and manage information. This is applicable in the context of induction, where a new employee enters an organisation, the integration and management of information enables the new employee to make sense of this world.

e) Effective learning requires meaningful, open-ended, challenging problems for the learner to solve

Constructivist thinking requires that learning be an active process and the acquisition of knowledge through active construction (Spigner–Littles and Anderson, 1999: 205, Fox, 2001: 24 & Kivinen & Ristela, 2003). In other words, learning requires action, such an action will occur through problem-solving activity (Fox, 2001). Therefore, in order for learning to take place, problem solving learning process are required for the learner to solve.

4.1.3. The Learner

The claims regarding the learner are an additional assumption made regarding Constructivist Learning Theory. Packer and Goicoechea (2000: 227) suggest that *'learning involves becoming a member of a community, constructing knowledge at various levels of expertise as a participant…'*. Learning involves a change or 'transformation' of both the individual and the social world in which they interact (Packer & Goicoechea, 2000 & Ackermann, 1996). However, Packer and Goicoechea (2000: 227) defines learning *as 'a change in knowing'*, but goes onto add that learning also *'entails broader change in behaving'*.

Therefore, for the learner, learning is the integration of the knowledge and information. This is support by Fox's view on Constructivist thinking that *'getting deeper into any subject depends on developing a rich data-base of relevant information, on knowing one's way around a topic, of having ready knowledge and skill available when it is required'*. (Fox, 2001: 32). Fox (1992: 38) cites Smith (2001: 32) that *'most of the time we learn without knowing that we are learning'*. However, learners need to be allowed to explore and generate many learning possibilities *'both affirming and contradictory'* through *'challenging, open-ended investigations in realistic, meaningful contexts'* (Fosnot, 1996: 29 cited by Fox, 2001: 32). Spigner-Littles et al.'s research has suggested that *'learners have consistently performed better when instructors ask probing, thoughtful, open-ended questions'* (1999: 208).

Fox (2001) expands on his initial definition of learning to say that learning is not only a memory activity, but also the acquisition of practical or physical skills as well as the understanding of a topic (Fox, 2001). Fox (2001) states that emphasising that learning is more about understanding of concepts than the 'rote learning' of facts. Constructivists view *'cognition is a complex social phenomenon ... distributed—stretched over, not divided among—mind, body, activity and culturally organized settings (which include other actors)'* (Lave, 1988: 1). It is therefore claimed, that in the constructivist learning theory, learning is a skill. Learning changes the individual leaner, for it is not merely information that is learnt, but rather it is an integration and application of this information and requires challenge. The understanding of the principles of learning as a skill, begins with the reflection that *'effective learning involves the acquisition of information, it also requires the information is appropriately applied'* (Rothbotom, 2003: 473). 'Effective learning' is also defined as learning as learning competence, however, it is important to understand the nature of such competence.

'Increasing an individual's capacity to learn and their involvement in the process of learning should be a primary concern. A focus on learning in an organizational context, rather than separate activities of training, development and education, seem best to facilitate this process' (Garavan, 1997: 47). Therefore, a skilled learner, according to Garavan, adds more than any traditional training program would.

'Enhacing an individual's learning competence does not refer simply providing study skills such as note taking. It also involves more than identifying an individuals' learning style. Competence in learning is concerned with deeper, underlying factors such as awareness of how someone learners, and the ability to integrate existing knowledge with new knowledge' (Rothbotom, 2003: 479). Therefore, when understanding learning as a skill or competence, the individual's capability to perform such a skill forms a foundational

building block of the induction process. The challenge is the understanding of the parts of this foundation.

a) Downs Theory of the Skilled Learner

Downs (cited Von Hirschfeld, 1991) found in her research that learning is not an innate ability, but instead it is *'a collection of skills that can be identified, developed and practiced'* (Von Hirschfeld, 1991: 200). Downs researched the concept of learning from a practical standpoint to determine 'how individuals learn' (2004). She determined throughout her 50 years of research that learning is an activity and provided theoretical justification for this assumption.

Down's model is not constructivist as a model. Her research has resulted in a practical theory as apposed to constructivist theory as a conceptual theory. It is not appropriate to marry these two models; rather it is appropriate to understand the match between the two. Constructivist theory provides the foundation, that learning is an activity; however Downs provides the practical methodology for the implementation of the learning in the organisation, arguing that learning is a skill.

Down's practical methodology is illustrated by Belbin, Downs and Perry (1981 & Pearn & Downs: 1988), who suggest the mnemonic of MUD to illustrate the way people learn: facts which have to be Memorized [M], concepts and principles which have to be Understood, [U] and physical skills which are best learnt by Doing [D] (Pearn & Downs: 1988). This assumption is that learning is greater than the knowledge itself, but rather is built on the premise of integration and application of this information into the world of the learner, namely the world of work.

Down's theory of a skilled learner provides a useful model that adds to a dimension to the research process. The model is useful in this research context because:

- The learning process is required to meet the organisation's learning needs and the learning design in Down's model meets the learning objectives laid down by the organisation.
- The workplace context has been Down's research field and makes her model useful as this research process is workplace specific.
- The learning process is experiential and allows for specific application into the workplace.
- The learning process meets the requirements in the organisation, either conceptual understanding, memorising of facts, changing of behaviour and performance of physical skills.

- The model is focused on adult learning.

The role of the learner, as suggested by Downs (Von Hirschfeld, 1991), is one of being an active participant. Packer and Goicoechea quotes Bredo (1994: 32) who states that *'one cannot independently define individual learning as separate from change in one's social role or identity'*. Von Hirschfeld (1991) makes reference to Knowles (1980) and his four key attributes of proficient adult learners:

- Adult learners are self-directed.
- They accumulated an experience in to an 'ever growing' pool. This pool becomes a rich resource for further learning increasing with time.
- Adult learners become ready to learn something when they experience a need to learn. Such a need is in order to cope more effectively with real-life tasks or problems.
- They shift their time perspective. As children, the context of learning has a delay in the application of knowledge or learning. In contrast, as adults, learners require a more immediate application of their learning. The focus of the learning in adults moves from a subject-centred experience to performance centred.

b) Responsibility for Learning

Given that learning is a skill and in order for learning to effective in its implementation, the following needs to take place (Von Hirschfeld, 1991):

- Learners require an internal need or a purpose to learn.
- The learning environment needs to be physically comfortable; the learning process must be one of mutual respect and trust as well as mutual helpfulness with all the learning participants and those facilitating the learning. In addition, there needs to be freedom of expression and acceptance of differences.
- Learners need to see that the goals of the learning experience are the same or congruent to their goals.
- Responsibility for the planning and operation of the learning experience needs to be shared with the learner and as a result, they will have a sense of commitment towards the learning.
- Participation by the learners needs to be active.
- Existing experience of the learners need to be used and related to the learning process.
- Learners need to have a perspective of progress towards their goals.

The assumption in this research is that the responsibility for the learning process resides with the learner. Greeno (1997: 9) argues that learners *'develop patterns of participation* *that contribute to their identities as learners, which include the ways in which they take initiative and responsibility for their learning and function actively in the formulation of goals and criteria for their success'*. This suggests that in order for learning to become part of the learner's pattern of behaviour, the process must begin with the acceptance of responsibility (Pearn & Downs, 1988).

The Constructivist view of learning believes that a *'teacher cannot control learning'* (Towers and Davis, 2002: 314). Spigner-Littles et al. (1999: 205) found in their research that *'...learners respond best when students and teachers share equal responsibility in the learning process and share equal respect for one another'*. Spigner-Littles et al. (1999: 204), go on to state that *'When permitted to control their learning environments, such students tend to focus their efforts on improving their existing skills'*. In addition, *'learning is most effectively accomplished when new information is connected to and built upon a student's prior knowledge and real-life experiences'*.

Given the above, if responsibility lies with the learner, then the learning process should be driven by the learner and not by the facilitator or educator. The learner is then assumed to be the primary driver for learning. In support of such an assumption, the authors Spigner-Littles et al. (1999) and Graffam (2003) state plainly that the learning process improves when the learning focuses on the needs of the learners and the material is relevant to the learner. Their research found that specifically older learners *'thrive'* when the learning activities focus on the following specific items:

- The learning process helps the learner develop new skills (Spigner-Littles et al., 1999 & Graffam, 2003).
- The learning process challenges the learner's pre-conceived ideas and ladder of inference, including the learner's notions, attitudes and beliefs (Spigner-Littles et al., 1999 & Graffam, 2003).
- The learning process assists the learner 'revise their world views' (Spigner-Littles et al., 1999 & Graffam, 2003).
- The learner develops self-direction in the process (Spigner-Littles et al., 1999 & Graffam, 2003).

'According to its proponents, student-centred learning encourages confidence in problem-solving, and interaction among students, hence developing interpersonal skills in relation to the context of subject being learnt' (McNally, 1979 cited by Squires et. al, 1976: 206). Older learners have expectations surrounding learning, which can allow for the learner to assert his or her personal responsibility in the process (Spigner-Littles et al., 1999).

Downs (Interview: 2004) in her research on learning and argues that the experiences of the learner have a tendency to block learning. It is thus important to address these blockages in order to ensure that the probability of learning taking place is maximised. Therefore, in order for the learner to take responsibility for his or her learning, blockages developed out of experience need to be addressed. Should this not take place, there is a reduction in the likelihood of learning taking place.

Fox states that *'if the context is far too removed from their horizon of expectations, they may well abandon the search for meaning, feeling either bored or confused, or both'* (Smith, 1975 cited by Fox, 2001: 31). Fox (2001: 31) suggests that in a Constructivist worldview, there are three parts of the learning aspects:

- *'making sense' aspect of learning'*
- *'making learning easy'*
- *'making learning satisfying'*

These statements suggest that development of learning and knowledge takes place within the context of the learner and does not happen in isolation. It is the responsibility of learner to ensure the above statements can occur. It is important to reflect on the corollary to the above assumption, that learners process information based their experience (Spigner-Littles et al., 1999). Therefore, in order to add to that knowledge, the learning process must be integrated and tie into the learner's previous experience and knowledge (Spigner-Littles et al., 1999 & Graffam, 2003). The tie-ins can be extended to include the learner's goals, values, beliefs and / or socio-cultural factors (Spigner-Littles et al., 1999 & Graffam, 2003). This further requires the learning process to be carried by the learner.

4.1.4. Other Roles in Learning

The complexity of the learning process includes a number of additional participants and it is important to understand who these participants are. It begins with the learner. In addition to the role of the learner, there is the role of the facilitator / teacher, whose role also facilitates the learning environment. These are skilled knowledge and learning facilitators, often experts in learning rather than the knowledge itself. Additional roles include the mentor or knowledge holder who allow for experience and knowledge to be transferred to the learner. This role is in partnership with the final role in the workplace learning process, the line manager or supervisor who facilitates the use of the learner's knowledge in the workplace itself. It is a central claim in this research that there are a number of role players in the learning process, which are defined as follows:

- The learner
- The trainer or facilitator

- The supervisor or line manager
- The mentor

There is often a great deal of overlap between the various roles in both different or similar situations (Von Hirschfeld, 1991), such as line managers sitting in the training situation and then assisting in the on-the-job coaching at a later date. As Lave and Wenger (1991: 53 & 51) comment *'learning involves the construction of identities'* and that *'one way to think of learning is as the historical production, transformation, and change of persons'*.

The principle that 'learning is an active process' highlights these different participants (Fox, 2001 & Packer & Goicoechea, 2000). These roles are not determined in isolation, but it is the relationship between the roles that create their respective identities. The learner's role is to learn, to absorb the information, gain understanding and to integrate and construct knowledge. The role of knowledge holder, facilitator or teacher is to facilitate the information transfer, develop understanding and to assist with the integration and construction of knowledge. This perspective is congruent with the constructivist view on the role within learning.

a) The Facilitator or Trainer

Trainers and facilitators have a responsibility that is functional, specifically for the design and delivery of formal training, generally off-the-job. Their role is more than just filling an 'empty vessel' philosophy. Instead, learning can be viewed in a more holistic picture, as an interactive process where the learner and facilitator / teacher interact to develop learning (Fox, 2001 & Blumer, 1969). Blumer (1969: 3) states *'Human beings engaging in action'*, they *'act singly, collectively, on behalf of, or as representatives of'*. Constructivist theorists go on to suggest that knowledge is created through the interaction of the learners, as well as the facilitator (Spigner-Littles et al., 1999, Fox, 2001 & Papert, 1996). This suggests the role of the facilitator and the learner becomes more blurred (Spigner- Littles et al., 1999). This reinforces the blurring of the roles in the learning process as highlighted earlier (Bredo, 1994). Spigner-Littles et al. (1999: 205) emphasis that Constructivist Learning Theory *'alters the roles between instructor and student in the learning process and [thus] makes the student more central to the overall process'*.

Fast (1999: 230) suggests that the facilitator does not 'tell' the learner the answers, but rather *'assists them in coming to their own conclusions by providing appropriate scaffolding activities'*. Hay and Barab (2001: 297-298) suggest *'that in a constructivist* *learning environment, the [facilitator] should not think of [him or herself] as the conveyor of knowledge'* and *'[he or she] does not need to be all-knowing and to control all aspects of the [learning process]'*. The role of the teacher is described by Hay et al. (2001: 297-298) as *'a facilitator of the knowledge construction process'* and this involves *'directing [learners] down profitable paths, modelling an engaged mind, problem solving with [learners], and providing a rich context with needed resources'*.

Constructivist theory suggests that the learning atmosphere and process needs to be managed by coaches and facilitators rather than traditional instructors (Spigner–Littles et al., 1999). These coaches or facilitators assist learners in the organisation of information, work around problem areas, address questions and situations in which discrepancies arise. This role of a facilitator is important in the learning process. This would assist the learner through encouragement and guidance and thus provide and *'to develop a set of meaningful paths through the learning process'* (Spigner–Littles et al., 1999: 209). This requires the use of an active learning process that stimulates the learners and encourages the learning process (Spigner–Littles et al., 1999).

b) The Supervisor or Line Manager

The role of supervisor or line manager creates the understanding that it is the interaction between the learners and the facilitator that facilitates learning. Such interactions also include those between the learners as well. This does not consider the circumstances where learning occurs outside of traditional learning interventions. Therefore, there is learning that takes place within the context of the job itself. In this case, the facilitators are the Learner's line managers and supervisors. They have an on-the-job responsibility for coaching and developing staff. This role is to facilitate the learning on the job and develop the learning culture with the learner.

c) The Mentor

Lave and Wenger (1991) and Hay and Barab (2001) offer an additional role player in the learning process, in the role of the 'old-timer' or mentor roles. The individuals in the mentor role are involved in the organisation and do not have a formal educative function, they are not certified trainers but rather they have experience regarding the skills, knowledge and abilities required to perform the function expected of the 'newcomer' (Lave & Wenger, 1991 & Hay & Barab, 2001). They provide a mentor or support function to the newcomer.

4.1.5. Impact on Induction

It is important to consider the assumptions made about learning in the context of the induction. For a new member of staff, there is information and knowledge that is required for their new position. The new employee, upon their joining of the organisation, would not necessarily know this information and knowledge. The challenge is that learning is a skill that needs to be developed. Therefore, the new employee would need to learn in order to fill this void. As a result, the new employee needs to have learning skills developed to an appropriate level in order assist with their integration.

The knowledge and information required for the new employee's position, needs to be integrated and be applied along with the specific behaviour and attitude that matches that of the organisation. Therefore, the individual learner needs an opportunity to develop through a formal process that increases the probability of the learning taking place and the quality and appropriateness of learning.

Learning is an active process and therefore, new employees need to be actively involved, as opposed to be passively given information with which he or she is expected to engage. In addition, given that learning has been described as a social activity, the construction and active process of the knowledge means that the new employee cannot do so in isolation and needs other learners to be part of his or her learning experience.

There are individuals who are able to facilitate the process and include his or her line manager, an individual who can provide a mentorship role and the learning facilitator themselves. It is important that in induction, these individuals are included to increase the probability and likelihood of success for this individual in his or her new position.

4.2. Induction

The theoretical discussion regarding induction begins with the examination of the definition of induction and the justification and purpose behind it. This provides the foundation and understanding of the subject. The chapter continues with the examination of the roles players and roles in the process and considers the activities involved. These activities have a relationship with the objectives and impact on induction.

4.2.1. Definition of Induction

A foundation of an induction definition is provided by Shea (1981) and Meighan (2000) who view induction as a process rather than an event, emphasising that induction is more that providing reading material to the new participant or getting signatures on company documentation. Hall and Goodale (1986: 275 cited by Gerber, Nel & Van Dyk, 1987: 208) present a definition which focuses on learning and information and knowledge acquisition as *'...the process by which the person [the new employee] learns to operate effectively in a new culture through the acquisition of information, values, and behavioural skills associated with one's new organisational role'.* A similar definition is that of Van Maanen and Schein who approach the principles of induction by viewing it as *'a socialisation process'* and define it as a *'process by which employees learn about and adapt to new jobs, roles, and the culture of the workshop'* (Van Maanen & Schein, 1979 cited by Klien & Weaver, 2000: 47). The argument here is that the role of induction is to prepare the individual for his or her role in the organisation.

An alternative definition is by Marks (1974: 6, also cited by Van Der Merwe, 1978: 3), who states that the aim of induction is *'to help the newcomer to adjust as quickly as possible to the new social and working environment, in order to achieve maximum working efficiency in the shortest possible time'.* This definition focuses on the integration process of the new employer to be operationally efficient. In comparison, Mark's definition focuses on the objective of the induction process, as opposed to Hall and Goodale's approach, which is more process focused. Marks (1974: 7) continues and states that induction that occurs *'before the selection interview and continues until the newcomer is fully integrated into the organisation'.* Therefore, Marks (1974) increases the definition beyond the formal induction process.

A number of authors agree that an inherent need exists to provide a process whereby individuals can undergo a transition into a new organisation (Klien & Weaver, 2000, Loraine, 1997 & Shea, 1982). Induction is a process to engage new staff and facilitate their influx so they reach the required level of efficient and effective productivity in a manner that reduces the length of time and cost of their induction. The challenge is how does this occur and is it worth the cost, both financial and time. It typically takes a new employee about six months or longer to become competent in his or her new position (France & Jarvis, 1996). This has financial and social consequences for the organisation.

The unpacking continues when considering the narrow definition that *'the planned induction process is about passing on necessary information and skills to the new worker'* (Human Awareness Publication, 1996: 5). Wagner and Childs (1995: 50) provide a summarised perspective as to the purpose of the induction process as to *'provided sufficient flexibility and complexity to allow [learners] to enter and develop competencies relevant to their needs, professional skills, knowledge, creativity and so on'.* Induction can balance the *'company needs for productivity with the individual needs for self-esteem'* (Kanouse & Warihay, 1980: 36).

In conclusion, induction is defined as a summary of the above definitions and is defined as follows:

Induction is an integrated, active and social learning process to guide the new employee to adjust quickly into the new organisational culture through the acquisition of information, values, and behavioural skills focused around their new organisational role. This is both in a working and social context to achieve maximum working efficiencies in the shortest possible time starting with the preparations undertaken prior to the interview with the new employee and until their full integration into the organisation.

From a strategic perspective, induction is seen as having an impact on the organisation and the new individual employee, this impact needs to be examined in more detail. In addition, the overall objectives of induction need to be considered.

4.2.2. Impact and Objectives of Induction

Two major authors, Meighan (2000) and Hacker (2004), were used in this research to build a picture of the impact of the induction process. This focuses on consequences and the effect of the induction throughout the time of the process, both from an individual perspective as well as an organisational perspective. In contrast, the overall objectives focus on the result that is desired and required from the induction program.

The justification for induction from an organisational perspective comes from the impact on the organisation, rather than the impact on the individual, because the driver for the induction process is the organisation itself. Shannon (interviewed in Leadership for the Frontlines, 2000) suggests a commonly held view that the primary driver for induction processes is to increase staff retention (Davies, 2001). Shannon believes that the key requirement of induction is to *'welcome your new hires and help them become acclimated to your company's culture'* (Leadership for the Frontlines, 2000: 7). Davies (2001: 55) suggests that the values of an organisation are *'the other big motivating influence'*. The compatibility of values between the member of staff and the organisation is key in motivation in the development of staff (Davies, 2001). The organisational and new employee impacts are detailed as follows. (These are discussed in more detail in Appendix B.1. Induction Impact (Page 109)):

Organisational:

- Improved financial position and reduction of costs (Hacker, 2004, Meighan 2000, Compensation & Benefits for Law Offices, 2001, HR Briefing (Aspen), 2001, Chancey, 1968, Garvey, 2001, Managing Training & Development, 2002, Lee & Reuschling, 1973, George & Miller, 1996, Strategic HR Review, 2002, Kennedy, 2001, Klienman, 2000, Jauch & Sekaran, 1978, Hicks (Editor), 2000, Robbins, 2002, Day & Cohen, 1988, Strategic HR Review, 2002, Managing Training & Development, 2002 & HR Briefing (Aspen), 2000).

- Assist with the implementation of systems (Meighan, 2000, Mestre, Stainer & Stainer, 1997).
- Increase employee retention and reducing staff turnover (Hacker, 2004, Leadership for the Front Lines, 2001, HR Briefing (Aspen), 1999, HR Briefing (Aspen), 2001, Compensation & Benefits for Law Offices, 2001, Office Pro, 2000, Shutovich, 2003, Robbins, 2002, Chancey, 1968, Garvey, 2001, Managing Training & Development, 2002, Lee & Reuschling, 1973, George & Miller, 1996, Leadership for the Front Lines, 2000 & 2001, Kennedy, 2001, Klienman, 2000, Jauch & Sekaran, 1978, Hicks (Editor), 2000, Day & Cohen, 1988, Strategic HR Review, 2002, Meighan 2000, Lindo, 1999, Creery, 1986, Logistics and Transport Focus, 2003, Schein, 1964 & Denova, 1968).
- Reduce communication breakdowns and mistakes (Hacker, 2004, Robbins, 2002, Kuzmits, 1976, Kanouse & Warihay, 1980 & Creery, 1986)
- Meeting the requirements of the National Qualifications Framework (NQF) (specific to South Africa) (Meighan, 2000).
- Influencing present staff (Meighan, 2000).
- Contribute to team development (Meighan 2000, Day & Cohen, 1988, Mestre, Stainer & Stainer, 1997 & Kanouse & Warihay, 1980).
- Addressing Affirmative Action (Lee and Reuschling, 1973, Kanouse & Warihay, 1980).
- Monitoring the external environment (Meighan, 2000).

New Employee:

- Increased motivation of the new employee (Meighan 2000, Day & Cohen, 1988, Mestre, Stainer & Stainer, 1997 & Kanouse & Warihay, 1980).
- Assist with learning/training and development (Meighan 2000, Hicks (Editor), 2000, Strategic HR Review, 2002, Robbins, 2002, Goodberry-Dyck, 2003, HR Briefing (Aspen), 2000, Office Pro, 2000 & Goodberry-Dyck, 2003).
- Create positive first impressions and expectations (Hacker, 2004, also discussed by Lindo, 1999, HR Briefing (Aspen), 2001, Garvey, 2001, Kennedy, 2001, Andersson, 2001, Hicks (Editor), 2000, McGillicuddy, 1999, Klienman, 2000, Kline & Peters, 1990, Robbins, 2002, Leadership for the Front Lines, 2000, Lindo, 1999, George & Miller, 1996, Shea, 1982, Hicks (Editor), 2000, Supervision, 2001 & Schein, 1964).
- Developing confidence and empowerment, but reducing anxiety and fear and motivating new staff (Hacker, 2004, Mahoney, 1969, Lee & Reuschling, 1973, George

& Miller, 1996, Hicks (Editor), 2000, Kanouse & Warihay, 1980, Mestre, Stainer & Stainer, 1997, Robbins, 2002, Meighan 2000, Mahoney, 1969 & Shea, 1982).

The objectives of induction focuses on the overall result that occurs when induction is in place and working effectively. The organisational and new employee objectives are detailed as follows. (These are discussed in more detail in Appendix B.2. Objectives for Induction (Page 115)).

Organisational:

- Improving Staff Retention (Healthcare Executive, 2003, Compensation & Benefits for Law Offices, 2001, HR Briefing (Aspen), 1999, 2000 & 2001, Office Pro, 2000, Robbins, 2002, Shea, 1982, Chancey, 1968, Wanous, Stumpf & Bedrosian, 1979, Garvey, 2001, Managing Training & Development, 2002, Lee & Reuschling, 1973, George & Miller, 1996, Kennedy, 2001, Klienman, 2000, Jauch & Sekaran, 1978, Hicks (Editor), 2000, Leadership for the Front Lines, 2001 & Shutovich, 2003, Shea, 1982, Andersson, 2001)
- Creating a Learning Organisation (Kur and Pedler, 1982, Jerving, 2003, Goodberry-Dyck, 2003, Loraine, 1997 & 1999, Prokesch, 1997: 158, Messmer, 2001 & HR Briefing (Aspen), 2001).
- Challenging to the Status Quo (Andersson, 2001, Andersson, 2001, Shea, 1982, George & Miller, 1996, Goetz & Zimmerer, 1975, Lindo, 1999 & Goetz & Zimmerer, 1975).

Individual:

- Acclimatising to the New Environment (Human Resources Department Management Report, 2002, Wanous and Reichers, 2000, Strategic HR Review, 2002, HR Briefing (Aspen), 2000, Shea, 1982, Andersson, 2001, Loraine, 1997, Mestre, Stainer & Stainer, 1997, Healthcare Executive, 2003, McConnell, 2003, HR Focus, 2001 & Leadership for the Front Lines, 2001).
- Familiarisation with of the Organisational Culture, Values and Indoctrination of the Organisational Philosophy (Human Resources Department Management Report, 2002, Leadership for the Front Lines, 2000, Healthcare Executive, 2003, Garvey, 2001, HR Briefing (Aspen), 2000, McConnell, 2003, Andersson, 2001, Shutovich, 2003, Shea, 1982, McConnell, 2003, Robbins, 2002, Rock, 1993, Lee & Reuschling, 1973, George & Miller, 1996, Jauch & Sekaran, 1978, Hicks (Editor), 2000, McGillicuddy, 1999, Strategic HR Review, 2002, Supervision, 2001, Compensation & Benefits for Law Offices, 2001, Human Resources Department Management Report, 2002)
- Clarifying Expectations (George & Miller, 1996, Kuzmits, 1976, Hicks (Editor), 2000, Kanouse & Warihay, 1980, Day & Cohen, 1988, Kennedy, 2001, Supervision, 2001, HR Briefing (Aspen), 2001, Compensation & Benefits for Law Offices, 2001, Robbins, 2002, Lee & Reuschling, 1973, Mestre, Stainer & Stainer, 1997 & Andersson, 2001,

Leadership for the Front Lines, 2001, Kanouse & Warihay, 1980, Healthcare Executive, November / December 2003 & Leadership for the Front Lines, 2001).

- Making Staff feel Valued and Important (Hacker, 2004, Mahoney, 1969, Robbins, 2002, HR Briefing (Aspen), 2001, HR Focus, 2001, Lee & Reuschling, 1973, Leadership for the Front Lines, 2000, Klienman, 2000, Hicks (Editor), 2000, Office Pro, 2000 & Lindo, 1999)
- Improve Morale & Motivation (Lee & Reuschling, 1973, Kennedy, 2001, Klienman, 2000, Hicks (Editor), 2000, Kanouse & Warihay, 1980, George & Miller, 1996, HR Focus, 2001, George & Miller, 1996 & Robbins, 2002).
- Understanding of the New Position and Role, including within a Team Context (Strategic HR Review, 2002, Healthcare Executive, 2003, HR Briefing (Aspen), 2001, Robbins, 2002, Wanous & Reichers, 2000, Office Pro, 2000, Hacker, 2004, Leadership for the Front Lines, 2001 & Healthcare Executive, 2003)
- Ability to understanding the Bigger Picture (Hacker, 2004, Office Pro, 2000, Garvey, 2001, Robbins, 2002, Supervision, 2001, Klienman, 2000, Jauch & Sekaran, 1978, Healthcare Executive, 2003 & Lee & Reuschling, 1973: 17).
- Gaining Organisational Information (Chancey, 1968, Andersson, 2001, Office Pro, 2000, McConnell, 2003, Compensation and Benefits for Law Offices, 2001, Day & Cohen, 1988, Ezzell, 1979, Leadership for the Front Lines, 2000 & 2001, HR Briefing (Aspen), 2000, Davies, 2001, Cox & Sweeney, 2001, Hacker, 2004, Managing Training & Development, 2002 & Ezzell, 1979).
- Developing Working Skills (Strategic HR Review, 2002, HR Briefing (Aspen), 2001, Robbins, 2002, HR Focus, 2001, Lee & Reuschling, 1973, Office Pro, 2000 & Goodberry-Dyck, 2003).
- Ability to Handle the Stress of a New Position (Wanous & Reichers, 2000, Leadership for the Front Lines, 2000, Loraine, 1997 & HR Focus, 2001).
- Modelling the Desired Behaviour (Wanous & Reichers, 2000, Lee & Reuschling, 1973 & Lee & Reuschling, 1973 & Strategic HR Review, 2002).
- Getting a Picture of Future Opportunities (Schein, 1964 & Leadership for the Front Lines, 2001).
- Building Relationships, Networking & Engaging in Teamwork (Supervision, 2001, Office Pro, 2000, Compensation & Benefits for Law Offices, 2001 & Jerving, 2003)
- Holding Regular Assimilation and Process Review Meetings (Supervision, 2001, Mahoney, 1969, George & Miller, 1996 & Compensation & Benefits for Law Offices, 2001)
- Addressing Technical Issues (Compensation & Benefits for Law Offices, 2001, Garvey, 2001, Connor, 2002 & Lee & Reuschling, 1973)
- Using Coaching Resources (Supervision, 2001, Kennedy, 2001 & Benefits for Law Offices, 2001, Mahoney, 1969 & Compensation & Benefits for Law Offices, 2001)

- Increased Productivity (Strategic HR Review, 2002, Managing Training & Development, 2002, Hicks (Editor), 2000, Mestre, Stainer & Stainer, 1997, Office Pro, 2000, Healthcare Executive, 2003 & Robbins, 2002)
- Developing understanding of Health, Safety, Security and the Environment (HSSE) (Kaletsky, 2003 & Shea, 1982).
- Revealing and Honest about Potential Pitfalls and Past Mistakes (Supervision, 2001 & Compensation & Benefits for Law Offices, 2001)

4.2.3. Roles in the Induction Process

There are a number of roles in induction. The challenge in some respects is asking 'who is part of induction'. (A more detailed discussion on the roles in the induction process is found in Appendix B.2.4. Roles in the Induction Process (Page 130)). The following are the roles in the process:

- HR / Learning (HR and Learning are separate departments in the business and this role is played by a representative of these departments).
- Induction Coordinator
- The Learning Facilitator
- The New Employee
- The Line Manager / Supervisor
- The Buddy
- The Mentor
- The Organisation
- Other Learners
- Other Employees

Hacker makes the statement *that 'creativity and outside-the-box thinking are in when it comes to orientating new team members...'* (2004: 92). The time and money invested will produce dividends in the years to come. The use of the various role players is important.

4.2.4. Various Models of Induction

Induction has a number of interpretations and a selection are detailed below:

Table 1: Induction Models

COVERAGE	DURATION	PERSPECTIVE ON INDUCTION
		WANOUS & REICHER
From recruitment & selection until end of year one	One week	Induction is an ongoing process and goes beyond the basics Does not describe what should be covered
		PENZER
When necessary	Ongoing with the informal learning	Address 'me-orientated' questions Believes in formal and informal learning Responsibility lies with the Line Manager and HR
		HACKER
From week one until end of year one	Unknown	Not all information, avoid policy only information Very detailed and ongoing process
		GEORGE & MILLER
Start up to six months	Regular meetings and discussions, slow transition	Information sharing is the focus Responsibility lies with facilitator & supervisor Planned interaction between the new employee and the supervisors Slow transition into the working environment
		ADDITIONAL AUTHORS (Wisenbaugh, Robbins, Lindo, Mahoney, Goodberry-Dyck, Kur & Pedler and Mestre, Stainer & Stainer – References to be found in e) Additional Areas Pg 33)
Varied	Varied	Use of checklists No management of inductee Use of technology Focus on entertainment and fun

The above table is detailed as follows:

a) Wanous and Reichers's Approach

Wanous and Reichers (2000) ask the question of how induction should be undertaken and suggest that the issue of the duration and timing is one of much debate. They argue that induction process should begin as close to the inductee's actual entry into the organisation. Gerber et al. (1987) argue that first few days of a job are important for both parties in the employment process, the employee and the employer (Shutovich, 2003, Garvey, 2001 & Leadership for the Front Lines, 2001).

Induction begins with the recruitment and selection process and continues right through until the new employee's first year is completed (Wanous & Reichers, 2004 & Strategic HR Review, 2002). This is wider than the traditional view, which views induction as only beginning when the employee first starts at the organisation. In this research, the assumption is made that induction begins only when the employee begins work. Wanous (cited by Wanous & Reichers, 2000) suggests that orientation starts on the first day up to the first week. Interestingly, Wanous and Reichers (2000) suggest that the induction time period must be longer than one week.

b) Penzer's Approach

Penzer (1973) argues that most newcomers have a number of 'me-*orientated questions'*, which are not answered or addressed in their orientation process, thus creating dissatisfaction with the induction and therefore organisation (Also Kennedy, 2001). Penzer (1973) suggests a formal and informal part of the induction process. The formal part of the induction process includes components such as induction and training workshops, formal self-directed training, films, technology-based components, company tours and employee packs (Penzer, 1973). The HR department or a coordinator oversees this process. To balance this part of the induction process, the informal part include meetings with Line Managers, introductions with staff, parties, celebrations, welcome cards, etc (Penzer, 1973). The newcomer's line manager oversees this component.

c) Hacker's Approach

Most organisations adopt the approach of 'teaching'; but Hacker (2004) argues that induction is not a single event, but rather an ongoing process and therefore 'teaching' it not appropriate (Also Hicks (Editor), 2000). There is a danger of information overload in traditional induction processes (Davies, 2001 & Hacker, 2004). Hacker (2004) argues that new employees do not need to be exposed to all the information and detail during their first few days at work. This exposure often takes place with the presentation of the company's policy document, and the assumption is that the new employee will read and assimilate all the information, without discerning that which is relevant and that which is not. The objective of learning is assumed because the new employee signs that they have read and understand the document. However, this may not be the case (Leadership for the Front Lines, 2001 & Goodberry-Dyck, 2003). Hacker (2004) allows of the process to begin within the first week and continue throughout his or her first year.

d) George and Miller's Approach

George and Miller (1996) talk about assimilation as opposed to induction. Their model of assimilation focuses on *'sharing the ownership for orientation and integration of the new employee in workplace'* (George & Miller, 1996: 49). George et al. (1996) state that facilitators are responsible for the workshop or classroom component of orientation, but the supervisor has most of the responsibility for the overall process. Their assimilation model consists of four parts:

- Advanced training for the recruitment process for the supervisors.
- Planned interaction between the new employee and the supervisors occurring on a bi-weekly basis over the initial induction period. Such meetings include conveying the company objectives, values, philosophy and expectations.
- Slow transition into the working environment, their time is spent *'easing'* into their new positions. The new employee spends *'classroom'* time (about 20%) and the rest *'doing their job'* in the first four to six weeks (George & Miller, July 1996: 50). This may not always be practical as that length of time may prove to be difficult.
- Post-orientation evaluation period to gather feedback after the initial period and then six months into their new position. This feedback in then incorporated into the evolving orientation process.

e) Additional Areas

Some organisations and authors propose the use of checklists and focus on documentation (Wisenbaugh, 2003, Robbins, 2002, Lindo, 1999, Mahoney, 1969, Hicks (Editor), 2000 & Goodberry-Dyck, 2003). This approach can be challenged as it does not allow for flexibility and puts responsibility for the process on a list. Much of induction takes place simply between the items on the checklist. Issues of relationship management and responsibility of the overall care for the inductee cannot truly be maintained from a checklist. But, it must be acknowledged that a checklist can be a useful tool to assist the organisation and staff in induction.

A key part of induction is that the learner must take responsibility for their learning (Kur & Pedler, 1982). This takes the responsibility away from the organisation, the facilitator, mentor, buddy and any other role players and places it firmly with the learner. This does provide a number of challenges with regards to the management of this responsibility and these would need to be addressed with each learner, as and when they arise.

It is argued that induction must commence as close to the employee's start date as possible and end when the employee is fully competent in his or her position, which is seen as being at the latest one year after starting. Actual practice does vary. In Japan, graduate induction is seen to last up to three years, but on average eight months (Mestre, Stainer & Stainer, 1997). In contrast, in the UK, the average is one hour (Mestre, Stainer & Stainer, 1997). Induction is an ongoing process (Leadership for the Front Lines, 2001) and the length of time may vary. The issue is to ensure the probability of the new employees success. This may result in the process being longer than expected. Joyce L. Gioia (in Leadership for the Front Lines, 2001: 7) states that *'good orientation should go beyond giving new employees the basics'*. The challenge is determining the objectives for induction and then ensuring these are met.

A number of authors' advocate the use of technology in the induction process (Hacker, 2004 & Strategic HR Review, 2002). This argument is debatable, especially if one considers the nature of the learning process and that learning is a social activity. There are costs and process implications in a technology based solution and because this does not create a social environment and there is no human interaction. It can be argued that this does not necessarily create learning. However, a middle ground is advocated, one in which both interactive socially driven learning is married with a technological methodology to improve the possibility of both implementation and success (Strategic HR Review, 2002 & Managing Training & Development, 2002).

Aside from these direct approaches, it is important that the employee's experience is fun (Leadership for the Front Lines, 2001). This allows for the employee to get a sense of enjoyment and not only a sense of responsibility and authority. Learning takes place in contexts when people are enjoying themselves. It is most effective to consider the needs of the organisation and tailor the induction process design to those requirements.

4.2.5. Learners in the Induction Process

Wanous and Reichers (2000: 436) argue that the issue about who classify as staff for the induction process, is relatively easy to address. This is because *'newcomers to organisations are included by definition'* (supported by Meighan, 2000). Meighan (2000) argue that induction should be based on individual needs, but this should be considered within the context of individual groups. Other views include 'internal transfers' and promotions could be included as there is transition in the move from one area or position to another (Supervision, 2001 & Meighan, 2000). Wanous and Reichers suggest that internal transition is a dramatic experience and is as dramatic as those of new employees (2000). Wanous and Reichers (2000) are of the opinion that internal transfers require some form of induction (also Meighan, 2000). Meighan (2000) also suggests that induction may also be appropriate for individuals away from the organisation for long periods of time.

There is the assumption by organisations that high level *'joiners'* or graduates do not require an orientation process. However, it is important to recognise that qualifications do not equal success: The qualification of a candidate, either with respect to education or prior achievements, in no way suggests the propensity for success in the new job (Supervision, 2001 & Compensation & Benefits for Law Offices, 2001). Therefore, it can be advocated that 'all' newcomers to the organisation, unrelated to position, status or skill, should undertake some form of orientation process. It is also advocated that managers and supervisors should have an induction process devoted to them (Seaver, 1997). This may not be possible, so an additional management component may serve to address core areas of the management function not covered in the general induction. Jerving (2003) suggests induction for directors and relates his own induction process as the new director of an organisation (also Meighan, 2000).

Meighan (2000) argues for the inclusion of staff transferring to different cities. France and Jarvis (1996) go so far as to suggest that bringing in long serving employees into the induction workshop allows for more powerful learning for the individuals and ensures all the parties understand the current view of the organisation. The challenge with such an approach is to avoid the learning of bad habits, this can be avoided through the use of assessments. Induction for visitors and contractors working on or in the business is also seen as important (Meighan, 2000). This is increasingly an issue with Health, Safety, Security and Environmental issues within the organisation and making newcomers aware of processes and requirements (Meighan, 2000).

All individuals, new to the organisation or part of thereof, in whatever form, should undertake induction (Meighan, 2000), including contractors can become permanent and there is a tendency for them to 'fall in the gaps' and not undertake induction.

4.2.6. Author's Induction Fundamentals

Given the above discussion, the approach undertaken is one that will most effectively meet the induction and organisational objectives, including the details laid out in the causal loop. The following are deemed as the most appropriate components to induction, creating a list of central claims for induction:

- Induction is an ongoing process
- The induction process can take up to a year
- The induction process answers a number of newcomer focused questions
- The induction process must avoid a danger of information overload

- The induction process has a formal and organised component (training workshops, formal self-directed training, films, technology-based components, company tours and employee packs) and an informal component (meetings with Line Managers, introductions with staff, parties, celebrations, welcome cards, etc).
- Managers and supervisors require an advanced development as part of their induction process.
- New staff must take responsibility for their learning in the induction process.
- The induction process needs to be fun and enjoyable.

This list details the basis to be adopted in induction; however the detail provides the picture as to how it is to be implemented to achieved the stated objectives.

4.3. Research Framework: Philosophical Issues

This section describes the philosophical framework, which informs the inquiry process. In developing a philosophical framework the intention is to explore the assumptions which influence perceptions and action in the inquiry process in order to establish rigour and validity.

The philosophical begins with an examination of the parameters and boundaries in this philosophical framework, it continues with a discussion on the impact of the philosophy on the research, exploring the philosophy of learning through meaning, systems thinking and the scientific method.

4.3.1. Why Philosophy?

Waring argues that one manner of *'addressing the complexity of human existence is to consider the characteristic of world-views'* (1996: 7). This *'Weltanschauung'* or world-view provides an interpretation of the individual's perspective of the world. In this context or perspective that the philosophical foundations of ontology and epistemology are considered. These philosophical foundations provide more depth to the worldview under discussion and explain how this is developed and maintained.

Crotty (1998: 3) provides a definition of epistemology as the *'theory of knowledge'*. This theory of knowledge looks at how knowledge is acquired and developed within the context of the worldview espoused. Midgley defines ontology as the area concerned with the nature of reality (2000). Crotty (1998: 10) goes on to state that ontology is the *'study of being,* it is concerned with the structure of reality. This nature of reality and its structure provide a perspective in which this worldview is considered. Such a theory may focus on multiple and variable perspectives or a single commonly shared perspective.

These philosophical issues inform the research design to order to establish coherence in the selection of methodologies and methods for inquiry as illustrated in Figure 2:

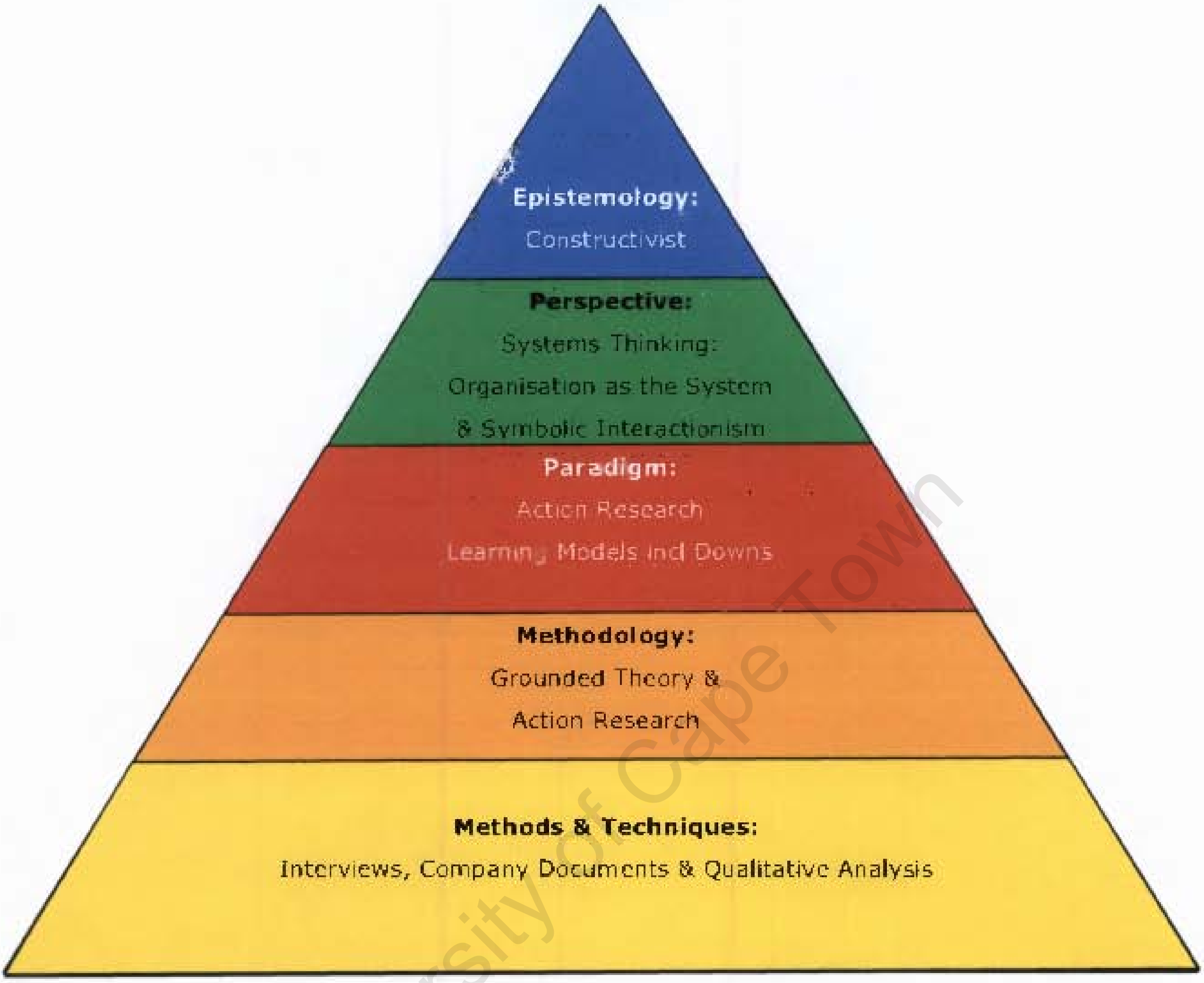


Figure 2: Positioning of Research Process

The philosophical framework provides the overall structure to the research allowing for the various parts of the inquiry process to fulfil their role in the research.

4.3.2. Defining Research Philosophical Variables

In this research context, the philosophical worldview is explored, allowing for the specific research process to be outlined. The assumptions are built around the premise of multiple realities. Each individual has a reality in which they exist and these realities are derived from the meaning of words and the understanding of each individual reality. In a collective of individuals, a shared meaning creates a shared or overlapping reality. The interactions between the individuals create learning and understanding of another's realities. This learning is not merely limited to the interactions between the individuals, but the interactions with self also allows for learning to take place. It is this learning with self takes place within a specific framework.

The individuals are brought together into a collective in the organisation, each possessing a specific purpose and role. This collective possesses a purpose and the interactions with this collective or organisation creates its meaning. This interaction is a process of learning, between the individual and the collective.

In the context of this research, the epistemology is based on constructivist thinking, which advocates that human beings construct realities. These realities are constructed through their meanings for the experiences and events. By creating realities through meaning, each individual will have a different view of reality. This creates multiple realities as each individual gathers different meaning from life experience, even if the experience is shared. These meanings and realities can and may be shared themselves, but each reality is equality valid, to be understood individually. Each individual has a valid and variable perspective of the world. The ontological perspective is post-modernist, allowing for multiple perspectives on the same reality. The reality is therefore defined through the individual interpretation of the world and the symbols therein.

It is the nature of the different realities that through the interaction between individuals, there is an interaction between the realities. Each reality has a different meaning. Through interaction, these realities create a shared meaning. This worldview is defined as a social action theory (Giddens, 2001), which place a far greater emphasis on the *'action and interaction of members of society in forming...the structures that underpin society and influence human behaviour'* (Giddens, 2001: 17). This social action theory is defined as symbolic interactionism and focuses on language and meaning (Giddens, 2001). It attempts to *'understand society and social structure through the examination of micro-level, personal, day-to-day interactions of people as individuals, pairs or groups'* (Newman, 1997: 40).

The philosopher, G. H. Mead, claims that language allows individuals to become aware of their own individuality and see self from the perspective of others (Giddens, 2001). In other words, with each interaction an individual has with others, gives definition to the individual. Mead argues that *'humans rely on shared symbols and understandings in their interactions with one another'* (Giddens, 2001: 18). In addition, people live in *'richly symbolic universe, virtually all interactions between... ...individuals involve an exchange of symbols'* (Giddens, 2001: 18). Mead's theory suggests shared experiences are all understood and experienced in a different manner. Symbolic interactionism focuses on the *'detail of interpersonal interaction'* and it is this detail that provides perspective on the manner in which individuals make sense of the outside world (Giddens, 2001: 18). This stresses the role of interaction in creating society and institutions (Giddens, 2001). This yields many insights into the nature of the actions of individuals (Giddens, 2001).

4.3.3. Impact on the Inquiry Process

The research process focused on the use of Mead's symbolic interactionism as the worldview, which allows for the assumption of multiple realities. Newman (1997: 40) states *'society emerges from the countless symbolic interactions that occur... ...between individuals'*. Samson (1987 cited by Doise, 1989: 390) says *'reality is socially constructed'* and *'meaning is culturally and contextually defined'*. The underlying perspective of the philosophy framework is a multiple reality-based worldview; post-modern in its approach with the assumption that the realities in which the individual interacts determines *'where society exists'* (Anderson & Taylor, 2004: 23).

This is micro sociological in approach, which contrasts with the more macro sociological approaches such as functionalism and conflict theory (Anderson & Taylor, 2004). Such a micro sociological approach allows for the view that it is possible to impact the individual through direct interaction and thus, change society (what ever the definition of society is), through human interaction. As society, defined in this context as an organisation, is constructed through the social interactions of individuals and if these interactions can be managed and specifically directed, the society or organisation can be moved in a desired direction (Berger & Luckmann, 1967; Blumer, 1969; & Shibutani, 1961 cited by Anderson & Taylor, 2004).

Constructivist Theorists, such as Gergen (1985), Smedsland (1985) and Sampson (1987) (all cited by Doise, Wille, 1989: 390 & Brown, Collins & Duguid, 1989; Lave & Wenger, 1991; Rogoff & Lave, 1984 cited by Ackermann, 1996), argue that reality is socially constructed and that meaning is defined by culture and context. As argued by Blumer (1969), *'behaviour cannot be explained merely in terms of factors such as age, race, social status, and income'*. Constructivist theorists have argued a theory of learning, (Fox, 2001) with a central claim that knowledge is gained *'through a process of active construction'* (Fox, 2001: 24, supported by Kafai & Resnick, 1996: 2 & Ackermann, 1996: 25).

It is important to acknowledge that Constructivist thinking is not a unified perspective and is subject to vary diverse interpretations (Towers & Davis, 2002). Within the Constructivist perspective, there are two alternatives namely the constructivist perspective which focuses on the individual and the individual constructions of meaning and the constructionism perspective which looks at the collective and takes a more socio-cultural view and is concerned with social processes in the production and legitimization of truth claims. (Gergen, 2001 cited by Bleakley, 2003). Within the context of this research, the worldview is more socio-cultural in view. This is the justification for the predominance of symbolic interactionism as the underlying philosophical context. Therefore, the area of emphasis is that of constructivist perspective and the individual constructions of meaning.

Therefore, it can be argued that in a new, different or varying context, according to Blumer (1969), the individual would gain knowledge and information through actively engaging in social interaction. This is *'in contrast to the previous focus upon the individual who uses knowledge to organize his behaviour'* (Blumer, 1969: 1). Instead, Blumer places social interaction as the focus. Learning and knowledge is gained through the group interaction and group engagement.

In contrast to general perception, it is not the rules that guide behaviour (Blumer, 1969). Instead, Blumer states (1969: 1) *'group life ... creates and upholds the rules, not the rules that create and uphold group life'*. The communication between individuals, *'receive messages, interpret them, define the situation, anticipate how others will act, formulate plans, make decisions to act, receive new information, and revise their plans'* (Blumer, 1969: 1). Symbolic Interactionism is built on the premise that *'human beings act toward things on the basis of meanings that the things have for them'* (Blumer, 1969: 1) and meanings are central and important themselves. Traditionally, the view is that meaning has no degree of importance and does not impact on human behaviour (Blumer, 1969).

The research is focused on the individual and his or her reality within the context of the organisation. Each individual possesses a different reality, with meaning and understanding of that reality gained through shared interaction with other individuals. Therefore, through induction individuals gain a shared meaning about the organisation and understanding of the world around them and develop appropriate patterns of behaviour.

4.3.4. Learning Through Meaning

It is through the interactions between people that the individual's learning increases their understanding of reality. In order to integrate into a new environment, the individual needs to gain an understanding and learn about this new environment. This learning is gained through meaning and is a process that gives each incumbent a commonly shared meaning and understanding. The individual learning occurs through the interaction between the various roles players. In this context, the role players are the incumbents themselves, as well as individuals within the organisation.

Learning occurs through the interaction of individuals. Therefore, it is important that without the interaction between the incumbents, learning and shared meaning cannot take place. Symbolic Interactionism argues that meaning arises out of the social interaction between individuals (Blumer, 1969). This contrasts with the traditionally held perspective that there is no process in the formation of meaning, rather it exists and meaning is regarded as an *'expression of constituent elements of the person's psyche, mind, or psychological organisation'* (Blumer, 1969: 1). However, not all learning takes place through the interaction with other parties. This assumption is challenged under the premise that people can and do learn in isolation. Therefore, learning can occur through the interaction with the incumbent themselves, and is called an *'interaction with self'*. (Blumer, 1969).

Blumer argues that through *'an interpretive process'* involving the person and the 'things' he or she encounters, meanings are managed and changed (1969). This interactive process has two steps: an internalisation process in which the individual interacts with him or herself, to indicate the things that have meaning, the so-called 'interaction with self' (Blumer 1969 & Kuwabara, 2001) and given the context or situation the individual finds him or herself and the action he or she intends taking, *'selects, checks, suspends, regroups, and transforms the meanings'* (Blumer 1969 & Kuwabara, 2001). This interpretation process is formative and the meanings that are used and revised, provide guidance for the action of an individual (Blumer, 1969).

The challenge to the research process was the ability to create a jointly developed and commonly understood meaning for all the stakeholders, including the new incumbents and the organisation. How does the organisation share the same meaning if the individual determines each meaning? Kuwabara (2001) argues that the view of symbolic interactionism is that 'society is dynamic'. He continues to suggest that *'human society [is] being constantly constructed and reconstructed by the "active individual"'* (Mamorua Funatsu cited by Kuwabara, 2001: 1).

This individually driven learning or 'self-interaction' needs to be appropriately driven, focusing on the areas of shared meaning. Even through learning is created through the interaction between individuals and within self, it needs to be orchestrated in order to ensure it is appropriate and creates the necessary learning to adapt to the new environment. However, this does further raise the question of individuality within the context of this new environment. Each individual within the collective has a role, which both defined and developed. These roles are important in the collective meeting its objectives and the individuals achieving their purpose for being in the collective.

Kuwabara (2001) discusses the argument that 'self-interaction' is merely the individual, autonomous in nature, which interacts with society but is not affected by it. This once again addresses the concept of the individual in society. In response, Kuwabara (2001) argues that individuals take 'schemes of definition' and 'generalised roles' from the groups of other individuals to whom he or she belongs. Kuwabara (2001: 2) defines the 'schemes of definition' as a channel or outlet to *'one's social action in social interaction with other people'*. 'Generalised roles' are defined as a channel or outlet *'one's action in self-interaction or interaction with oneself'* (Kuwabara, 2001: 2). Therefore, the symbolic interactionism is about the interaction with both self and society or the collective. It is thereafter that the individual's interpretation of definition, in a social interaction, is guided by the above designed frameworks, namely the 'schemes of definition' and 'generalised roles' (Kuwabara, 2001). Kuwabara (2001) continues with the process of defining the interpretation component of Symbolic Interactionism, outlined as follows:

- The acquisition of 'generalised roles': In other words engaging in self-interaction.
- The acquisition of 'schemes of definition': In other words engaging in social interaction with other individuals.
- The overall picture is that Symbolic Interactionism is focused around the individual's interaction with him or herself or the social interaction with others.

This has direct consequence for the incumbents into the organisation. The assumption is that in order for the incumbents to learn and adapt to integrate into the organisation, they are required to interact with the parts of organisation, these being individuals or collective parts. It is through this interaction that the incumbents truly learn.

4.3.5. The Organisation as a System

Systems thinking provides a manner in which the research process is viewed. The boundaries of a system is the social or personal construct that defines the limits of the knowledge that is taken as pertinent in an analysis (Churchman, 1968). Therefore, a system can be made up of groups of individuals, in an organised collective relationship such as the Company as well as an ad hoc collection. Each individual forms part of the collective and engages in the system, influencing and being influenced.

A question is how the new learner or individual engages the collective system. It can be said, based on the principles of symbolic interactionism, that the individual learner will engage the system based on commonly shared language between him or her, the other individuals and the organisation. The nature of systems is that they have an emergent or adaptability within them, which are difficult to predict (Waring, 1996). This developing nature of learning allows for the system to grow. This learning also takes place with in the individual components of the system itself.

This organisation, made up of individuals, is driven by a unified purpose move towards a shared goal and continually develops through shared learning. As these individuals interact with one another, they create a common language and shared understanding of realities. In this research, a number of assumptions have been made regarding systems theory. These are to be examined in the context of the theoretical framework and the research subject. This discussion on the role of systems theory begins with the examination of the organisation as a system and includes looking at the characteristics of the organisation in this context. The process then examines learning within a system and then the role of systems in the learning process, specifically looking at Appreciative Systems. The process considers the systems theory assumptions made in this research.

The first assumption in this aspect of the research is the view that the Organisation is viewed as a system. This assumption means that the organisation possesses the same characteristics as that of a system. The view includes the perspective of system boundaries and recursion within the greater system of the organisation. Systems Theory views the world as *'systems made up of a whole hierarchy of overlapping sub-systems'* (Vickers, 1970: 91), and there a *'trends have been toward much increased capacity for communication, greater complexity of goals a economic interdependence has increased, much reduced deference toward authority of any kind, and the dismantling of monolithic institutionalized power structures',* (Checkland, 1994: 15), in other words increasing complexity. It is in this complexity that new individuals must connect with the system.

The system itself is a complex entity, and can be seen as independent of people. However, it is the individual person and the interactions between the individuals that gives the system its complexity, this is because the human part of the system makes the system difficult to predict and thus unstable (Checkland, 1994). It is the humanity, the individual that makes that situation unstable (Open University, 2004).

The instability of the individual in his or her arrival into the organisation provides a stress on the system. However, it is through the integration of the new individual that this instability is reduced and this is the role of the manager. This is because it is the nature of the management role to lead a system filled with individuals that create instability. Therefore, the argument is that the difficultly with the role of management is that it requires the leading of the organisation (Checkland, 1994), through this organisational instability.

The first key assumption about the organisation is that the perception of the organisation's nature and size determines the role of the manager. Checkland argues that if the perception of the organisation be limited, then the perception of the manager's role is limited as well (1994). Therefore, in order to examine the role of management, the examination of the organisation needs to be undertaken as well.

The second key assumption of the organisation as a system is that the organisation is greater than the sum of its parts and provides a synergy in which the organisation operates. This synergy is supported by the theoretical perspective of the systemic view (Open University, 2004). Checkland outlines a perspective that *'the activity undertaken by managers can be seen as a system of activity that serves and supports and makes its contribution to the overall aims of the organisation as a purposeful whole'* (1994: 76).

A further assumption regarding this synergistic element of the organisation is that this system is assumed to be designed to perform a function, fulfil a purpose or has a *raison deter* (reason for being). This purpose provides the direction for the organisation, yet it is the 'organised' nature of the organisation that provides the approach to be adopted (Open University, 2004) and creates the synergy that allows for the organisation to be greater than the sum of the parts (Open University, 2004). This purpose is assumed to be around which the individual members of the system unify. It is consider conventional wisdom that the *'organisation is social collectivity that arranges itself so that it can pursue declared aims and objectives that individuals could not achieve on their own'* (Checkland, 1994: 76). This allows for the manager to have a role to help the organisation achieve these objectives (Checkland, 1994). The key is making sure all the individuals are commonly aware of the aim.

The role of the manager in this process is important. As stated, the manager's role is dependent on the nature of the organisation. A key part of the *'manager's activity is rational decision making in pursuit of declared aims'* (Checkland, 1994: 76). The decisions made by the manager take place within the boundaries or laws of the system. These laws, different at different levels within the organisation, define the organisation as a system. These laws provide the boundaries in which the collective system operates (Open University, 2004). The boundaries are complex as the rules of various systems can clash, and the various individuals that enter the system may have different understandings of the boundaries. This is often as a result of multiple systems being involved. This provides interesting challenges in the context of the modern organisation.

Vickers (cited by Checkland, 1994), suggests that this epistemological view as inadequate. Rather, he suggests that activity can be regulated through *'attaining or maintaining desired relationships through time or in changing and eluding undesired ones'* (cited by Checkland, 1994: 81). Vickers argues that there is a 'course-generating' function within the system (cited by Checkland, 1994), which provides two functions, stabilisation of the system, and serves to bring the achievements of the systems in line with the various standards of success (Vickers cited by Checkland, 1994).

Stabilisation of the system is a process of moving the system into a state of equilibrium within itself and the external environment. Part of the equilibrium is the learning of the system as it adapts to the changes around it. A new individual added to the collective requires integration to stabilise the system as quickly as possible or to return to equilibrium. This emphasis the need for a process to allow for integration as it cannot merely be knowledge that allows for the integration, but rather a more complex process. This can be understood through the use of the Appreciative Systems model.

a) Appreciative Systems

Sir Geoffrey Vickers introduces the concept of Appreciative Systems, which is used to describe human activity and social processes (Open University, 2004). Appreciative Systems are appropriate to this research process as the focus is on human systems, *'from the personal through to the very large, human, social systems'* (Open University, 2004: 1-2). The research is about the introduction of new persons into a system and therefore, the relationship of the 'personal' or individual with the organisation or 'very large, human, social systems' is seen as important.

Appreciate Systems concept starts with *'the interacting flux of events and ideas unfolding through time'* (Checkland, 1994: 10). This interaction leads to an inability to separate the parts of the system (Checkland, 1994) and *'appreciation perceives (some of reality, makes judgments about it, contributes to the ideas stream, and leads to actions that become part of the events stream'* (Checkland, 1994: 10). Vickers theory works on the principle that every interaction causes a response and therefore meaning, resulting in an interaction. This creates a contribution to the flux of events (Checkland, 1994: 11). Vickers theoretical perspective marries with the constructivist and symbolic interactionism philosophical framework. In the context of this research, the systems perspective focuses on the relationship between the participants, the individual and the organisation.

An appreciative system has the requirement of meaning, which is derived from information (Checkland, 1994). Through the relationship between the participants, they gain meaning from their interaction. As a result, the interaction must be encouraged and developed. It is through the interaction of these participants, they can *'tacitly determine what [they] notice, how [they] discriminate situations from the general confusion of ongoing events, and how [they] regard them, constitute a system because they are mutually related - a change in one affects the others'* (Varey, 2001: 3) because of the relationship of between the participants and the system itself.

Vickers claimed that *'he had constructed an epistemology that can provide convincing accounts of the process by which human beings and human groups deliberate and act'* (Checkland, 1994: 83). In the context of the system, there is a constant change and adaptation due to the nature of the participants in the system. This is because of the epistemological perspective that *'the appreciative system is always open to new inputs'* and this *'seems essential if the model is to map our everyday experience of the shifting perceptions, judgements, and structures of the world of culture'* (Checkland, 1994: 83 & Varey, 2001: 3 respectively). The nature of Appreciative Systems is the variability in nature as they are social systems.

Vickers describes social systems as patterns or ongoing sets of relationships between the role players, either the individual or the organisation (Checkland, 1994). This reinforces the premise that it is the relationships between the participants and the system that underpin the system itself. Varey emphasises that a *'social system ... governed by mutual expectations, which are usually embodied in role'* (2001: 2).

The essential activity of individual in the system is the relationships therein. This includes the establishment and maintenance of these relationships (Bawden, 2001). If the system is built on relationships then the building of these is *'social capital'*, then *'learning is its currency'* (Bawden, 2001: 29). These relationships are broken down into two parts, internal between the individuals and external between the organisation and the external environment (Day, 1999). It is in these relationships that learning takes place.

(i) Appreciative Systems and Learning

Given that learning is a social activity, and learning derives from communication between the parts of the system, the result is that learning depends on this communication (Checkland, 1994). Vickers offers a different perspective as he rejects *'goal-seeking model of human behaviour'*, which suggests that people are not directed always to a specific end objective (Varey, 2001: 3). *'The appreciative system determines what facts* *we select ... the meaning we give them, and the means we use to reduce the mismatch between existing and desired situations'* (Varey, 2001: 3). The nature of the learning is driven by interaction with the environment (Packer and Goicoechea , 2000) and Vickers offers the perspective that *'managing relationships is the general case of human action'* (Checkland, 1994: 87).

The nature of the system and its adaptability is based on relationships and requires learning and skill to cope with the nature of the reality. Therefore, there is no fixed social reality as it changes through the social process (Checkland, 1994). Appreciative systems apply to the individual, group and organisation (Checkland, 1994). This creates the emphasis of interdependence of a healthy community (Varey, 2001). Therefore, the leadership of the community or organisation needs to manage and respect diversity, yet at the same time encourage the collective values that *'build the team spirit for effective and satisfying co-operative performance'* (Varey, 2001: 4). This creates reciprocal relationships, which develop a mutuality and *'regulates relationships, and can build mutual knowledge and understanding and create initiative and enterprise'* (Varey, 2001: 4).

Vickers moves the focus from goals to managing relationships, which are based around the standards generated by the participants' history (Checkland, 1994). However, the challenge is for new individuals who then join this appreciative system. How can these individuals learn about the organisation? Vickers view is that *'the organisation is a network of conversations or communicative interactions in which commitments are generated'* (Varey, 2001: 5). As a result, a process is required whereby new individuals can be effectively integrated into the system and become part thereof.

(ii) The Rules and the Appreciative System

It is argued that these social relationships, as envisaged by Vickers, require regulation and management and this is achieved in organisation through the formation of policy and control (Checkland, 1994). These standards or policies are there to maintain the relationships that have value to the individual and reducing or removing the undesirable relationships (Checkland, 1994). The challenge is each individual may view the same situation with different understanding and perspective (Checkland, 1994). Varey states that the *'central role of communication is the regulation of societies'* (2001: 2). Vickers keeps the focus on the nature of the social relationships. However, he states that the problem within these relationships is that culture and communication cannot be separated (Checkland, 1994). It is through culture and communication these relationship attain a degree of self-balance and dynamic stability (Vickers, 1968: 19 cited by Day, 1999: 113).

Varey states that in order for communication and cooperation to occur, a degree of commonly shared assumptions must be held (2001). These assumptions revolve around the world in which individuals and the organisation exist (Varey, 2001). This provides a 'common standard' upon which the actions of the individual and organisation are assessed (Varey, 2001). Individuals need to share their epistemological assumptions as these need to appropriately match reality for there to be common action that is effective (Checkland, 1994). The shared ethical assumption is the 'culture' that unites the collective and *'is the shared basis of appreciation and action which communication develops within any ... system'.* (Open University, 2004: 1-2).

Therefore, the challenge in any system is to create a commonly shared understanding. This occurs when examining the mental construct that the individual creates (Checkland, 1994). This construct may be *'partly subjective, largely intersubjective (i.e. based on a shared subjective judgement), constantly challenged or confirmed by experience'* (Varey, 2001: 1). These constructs satisfy the philosophical justification of that of Constructivist thinking and hence, the principle of Appreciative Systems do operate in a manner that is complimentary to the foundation and framework of this process.

4.4. Conclusion

This chapter examines philosophical issues for the purpose of locating the inquiry process. The assumptions include that different people make meaning in different ways supported by constructivism and symbolic interactionism. The introduction of systems thinking expands this framework as a foundation to the introduction of methodology and methods introduced in the next chapter.

In addition, the purpose of this chapter was to present a review of literature as a theoretical framework that informs this research. This includes a discussion on theories of learning with a primary focus on a constructivist approach and the extensive and varied area of induction theory.

Chapter 5: Methodology

This chapter focuses on the qualitative research strategies which are consistent with the philosophical assumptions detailed in the previous chapter. Methodology is defined, the paradigm choice is outlined and arguments presented for the choices made. This is followed by a description of methods appropriate for this research.

5.1. Methodology

Crotty (1998) states that the methodology used is built upon the foundation of the epistemology and the theoretical perspective. These offer a theory of knowledge and philosophical stance which informs our choice of methodology. In turn, the methodology as the research strategy or plan of action (Crotty, 1998) guides the research in the detailed methods, techniques or procedures used to gather and analyse data related to the research hypothesis.

5.1.1. Action Research

Action Research is the chosen paradigm for this research. The argument for any paradigm is based on its fitness for function and the justification for the use of Action Research in this research is that there was a complicated, social problem to be solved, involving numerous stakeholders and role players within a complex organisation environment. Action Research is able to involve the various role players and stakeholders, without the presentation of a predefined answer to the research question. In addition, it is useful for *'creating change, innovation, leadership and personal, professional and organisational learning'* (Zuber-Skerrit, 2001: 1).

Action Research was also seen as appropriate as it provided the opportunity to address the challenges that the research posed; namely: the emerging problem as the problem was not fully defined initially, the ability to include all the role players in the process, and allowed for the balance between answer to emerge and also allowing for the relevant business needs to be met.

Action Research is defined as *'a cyclical iterative process of action and reflection on and in action'* (Zuber-Skerrit, 2001: 2) and is further detailed as *'more systematic, rigorous, scrutinisable, verifiable, and always made public'*. (Zuber-Skerrit, 2001: 2 & 18). Within the context of this research, Action Research provides a great degree of detail and is rigorous, to ensure sustainability of the outputs. In the context of this research process, the Action Research is part of a process that addresses a real problem that exists in the organisation. There is an integration and interdependence of the two parts, namely the research process and the actual problem-solving exercise (Zuber-Skerrit, 2001).

Action Research provides the opportunity for a participative process (Dick, 2002) that seeks to address a key organisational question of inclusively (Dick, 2002). Action Research allows for change, which at times *'requires flexibility and participation'* and *'research depends on high quality data and accurate interpretations'* (Dick, 2002).

The detailed Action Research process is based around Handy's Wheel of Learning. This 'wheel of learning' possesses four phases, namely Question, Theory, Test and Reflect / Evaluate (O'Brien & Hart, 1999). This process is the foundation for the Action Research Model (Dick, 2002 & O'Brien & Hart, 1999), detailed in Figure 3:

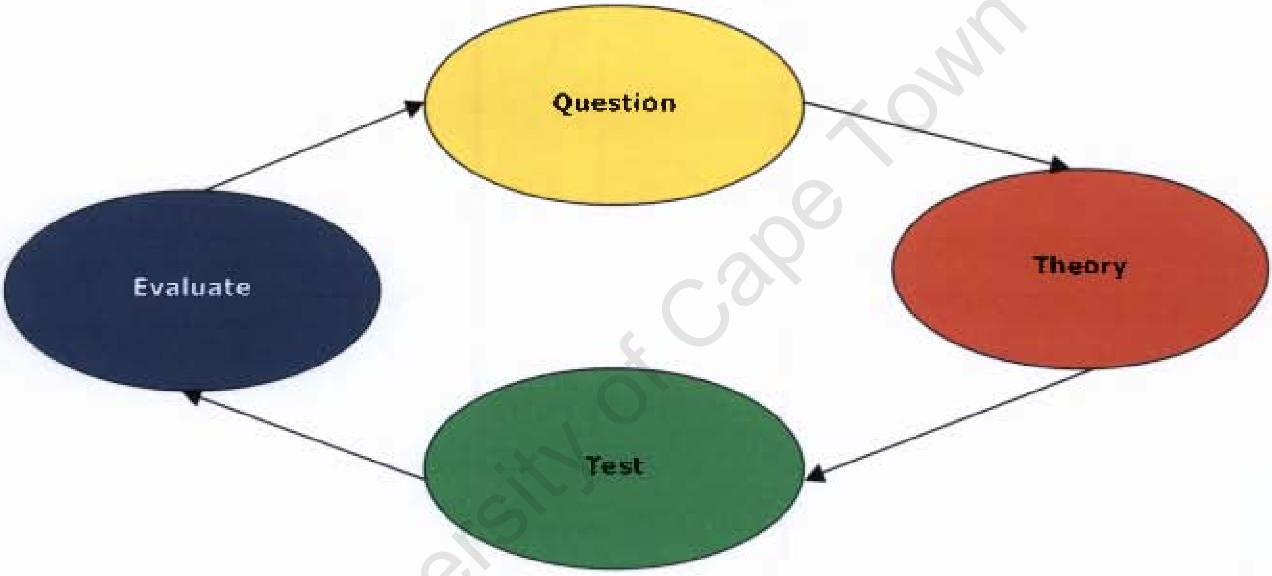


Figure 3: Handy's Model of Learning (O'Brien & Hart, 1999)

The understanding of the detail regarding Action Research emerges when looking at Bob Dick's description thereof, as a *'family of processes which allow the dual pursuit of action, or change, and research, or understanding'* (Dick, 2002), which involves a number of important steps:

a) Scoping and Assessment Process (Problem Definition and Needs Analysis)

The initial challenge is to clarify the concern and develop an understanding of the status quo and what is required to address the challenge (Dick, 2002). It is within this context that the initial situation and problem are discussed with the problem holders. The problem holders have a detailed understanding of the current situation. The evaluation of the initial situation looks at a key element, namely the frame of reference of the context and of the problem holders (Fortuin, Greathead, Hector, Mouton, Pereira, 2002).

The problem is based on perception of the problem holders and observers, and this is not necessarily based on actual data. Therefore, it is important to gather some details regarding the initial situation. The iterative nature of the Action Research allows for constant refinement of the initial perceptions and understanding of the problem situation (Fortuin et al, 2002 & Dick, 2002). The initial assessment from the problem holders is that the problem and resolution is of high importance (Fortuin et al, 2002).

The initial perception of the problem needs to be verified or dismissed through an initial diagnosis (Fortuin et al, 2002 & Dick, 2002). Part of this diagnosis is determining the boundaries of the research (Dick, 2002). This evaluation also includes an examination of the information available and the extent of the problem and an assessment of the perceived definition of the problem (Fortuin et al, 2002). This is detailed in Figure 4:

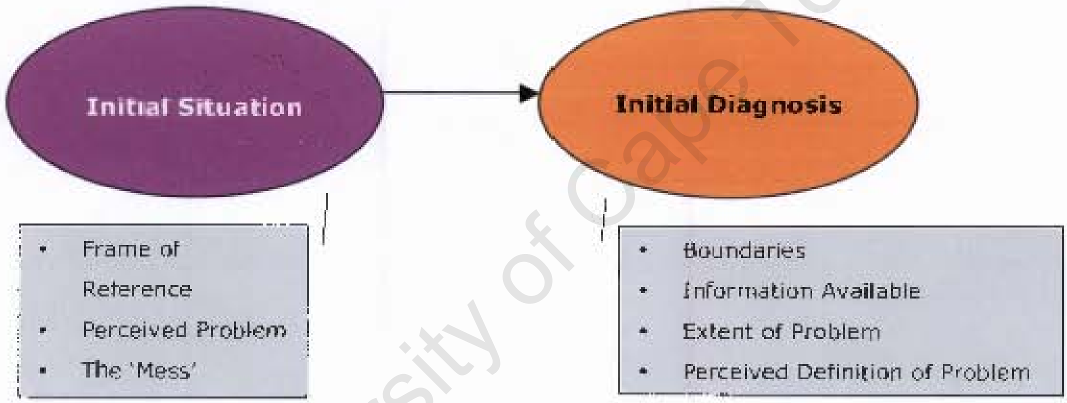


Figure 4: The Initial Phases of the Action Research

b) Stakeholder Data Collection

Once the initial situation and diagnosis has been completed, the Action Research continues with entry and engagement (Dick, 2002). It is at this phase that most of the problems begin (Dick, 2002). Therefore, it is important to address as many of the potential problems prior to the commencement of the process (Dick, 2002).

The initial challenge is to determine the various stakeholders in this context. The difficulty is that control is largely out of the hands of the author, but lies in the hands of the Company. As a result, much of the process is limited by the requirements, expectations of the Company and other organisational restrictions. The next phase of Action Research (Fortuin et al., 2002) is detailed in Figure 5:

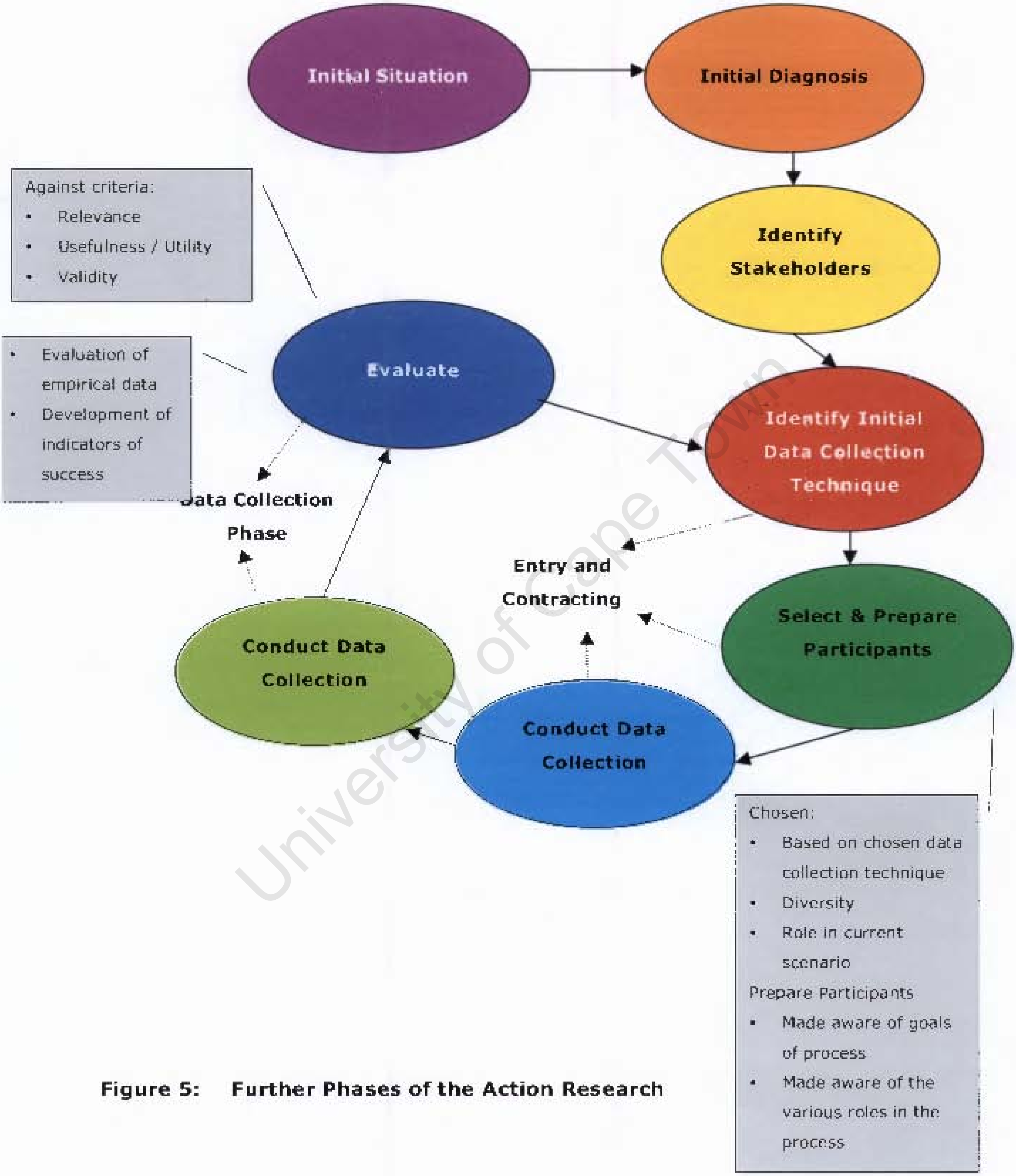


Figure 5: Further Phases of the Action Research

c) Stakeholder Identification

When beginning, the focus is the investigation and data gathering from the stakeholders. There are a number of potential stakeholders; Dick (2002) divides them into four groups:

- **The presenting client:** The presenting client is the initial contact point for the project.
- **The principle client:** The principle client is defined as *'someone who is given primary allegiance'* and is described as the bill or veto payer over the research (Dick, 2002).
- **Direct stakeholders:** Direct stakeholders are individuals affected directly by the research. Customers, suppliers, shareholders, managers, etc, are the type or cross section of individuals in a process (Dick, 2002).
- **Indirect stakeholders:** The stakeholder group also includes individuals who may not have an obvious or direct stake in the outcome and are often harder to identify. They often only reveal themselves after the process or decision has been made (Dick, 2002).

d) Entry and Contracting Phase & Data Collection Phase

The entry and contracting phase provide the agreement on the scoping of the project and the boundaries of the process:

(i) Identify Initial Data Collection Technique

The first part of the entry and contracting phase is to agree on the initial data collection technique and process.

(ii) Select and Prepare Participants and Conduct Data Collection

The individual stakeholders in the process need to be briefed and prepared according to the relevant data collection method. They need to be made aware of the objectives of the process and the expectations of their role therein, both initially and in the future (Fortuin et al, 2002 & Dick, 2002). The data collected must be assessed through the following criteria:

- Quantity
- Quality
- Appropriateness
- Ability to provide appropriate diagnosis and relevant solutions.

This process is the same for the data collection phase when the process is performed in more detail.

(iii)Evaluate

The evaluation phase is designed to ensure the data has a degree of integrity and is appropriate for the context. Figure 6: offers a more detailed model for the phases of the Action Research (Fortuin et al., 2002: 11). The process of evaluation asks where the problem or research question has been solved. If so, the process is complete. However, if not, a review is initiated until the appropriate point of commencing the research is reached and the process continues until the problem or research question is solved:

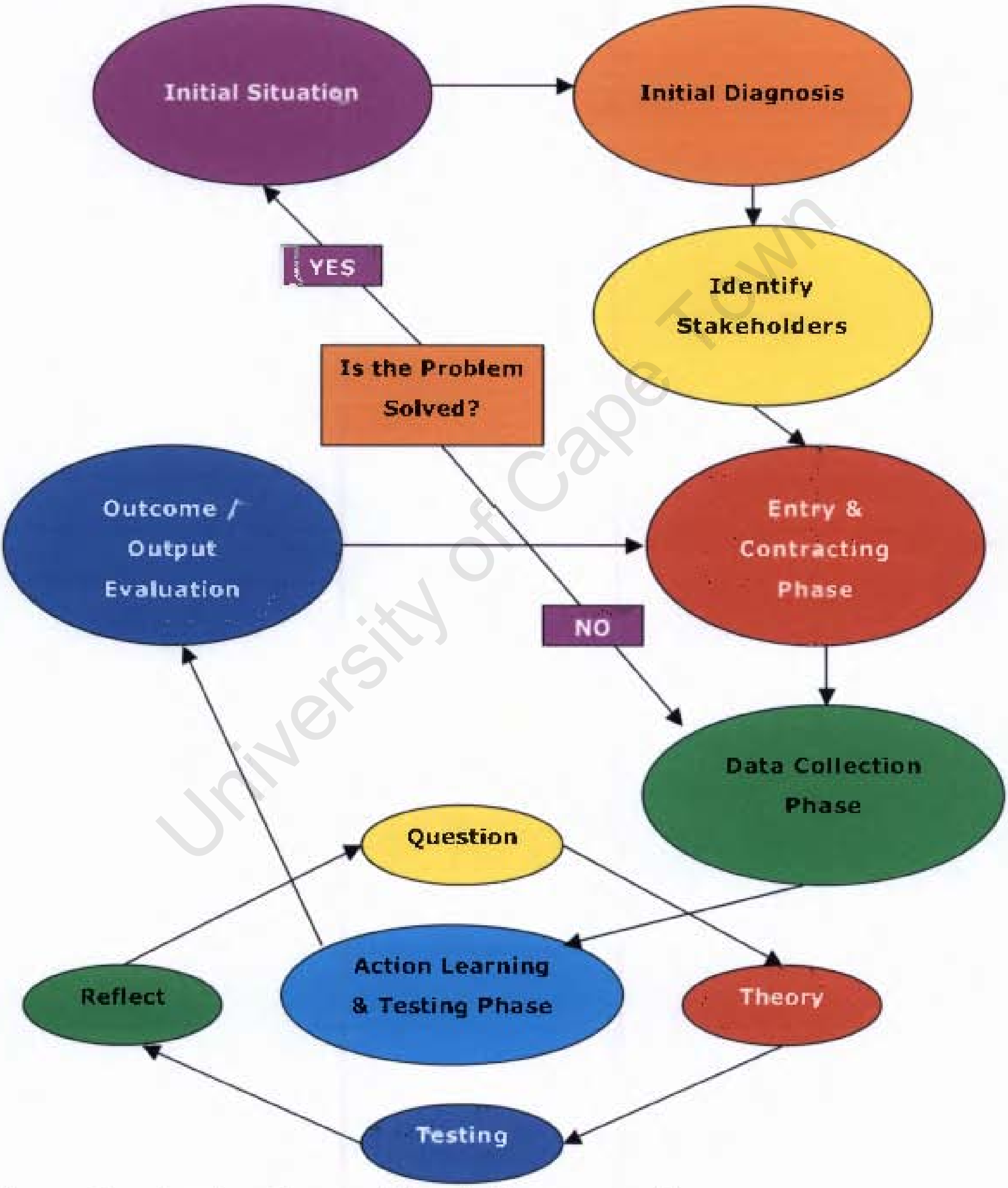


Figure 6: Further Phases of the Action Research

e) Action Research and Testing & Output / Output Evaluation

Once the process of data collection is evaluated, the project enters the action phase. This results in the formation of the relevant hypothesis for this context (Fortuin et al., 2002). This question, or hypnosis, is tested or actioned with the empirical data collected during the initial phases of the project (Fortuin et al., 2002). The evaluation process then allows for further assessment of the data and also the formulation and identification of the specific indicators of success (Fortuin et al., 2002).

The action process can be repeated as many times as necessary in order to move into the final evaluation (Fortuin et al., 2002). The final evaluation of the overall process provides a confirmation or rejection of the answer to question posed in the original problem statement (Fortuin et al., 2002). Should the evaluation process reject the outcome; the data collection process is then repeated (Fortuin et al., 2002). This repetition is to either determine the failure of the action against the relevant criteria or to choose a more appropriate action (Fortuin et al., 2002).

To support the Action Research model, Zuber-Skerrit provides a picture of the use of Spiral Action Research cycles (2001). Action Research offers an increasingly revised plan, and challenge to the prevailing problem question. This allows for constant refinement and improvement in the development of the response to the problem statement and increases the probability of the process reaching a successful conclusion.

Zuber-Skerrit offers the Generic Process Model as an example for the process that can be used in organisation (2001: 20-21), detailed in Figure 7:

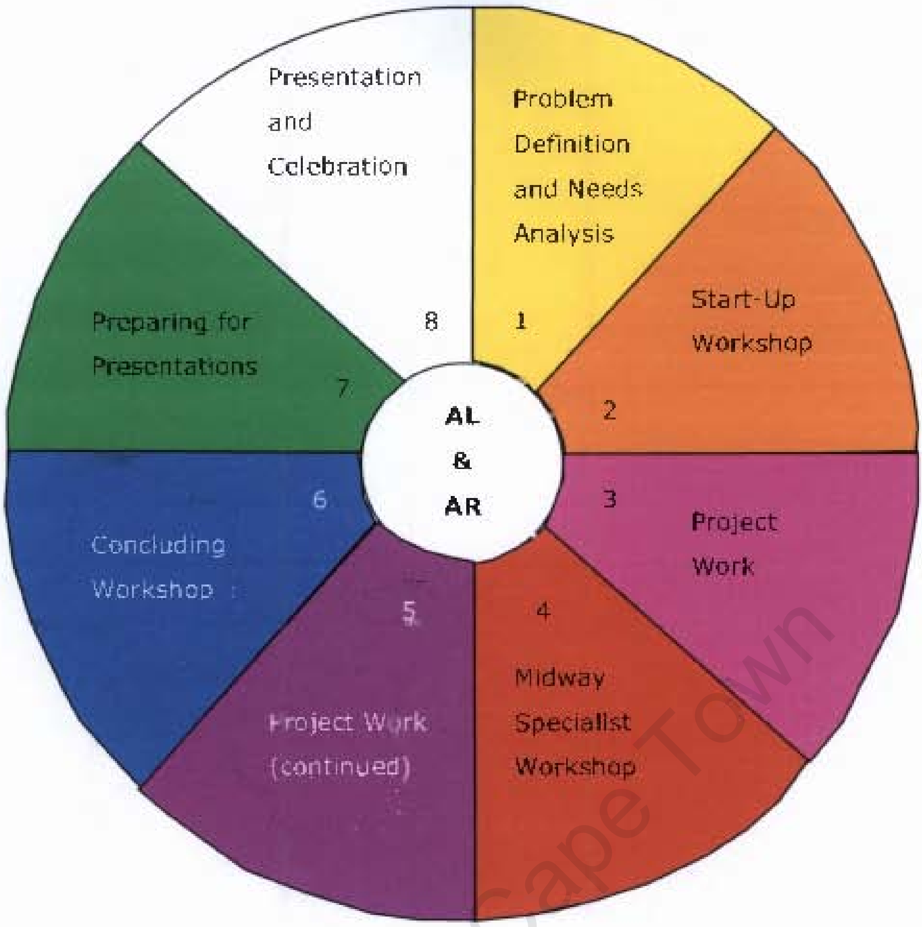


Figure 7: A Generic Process Model

The above eight-step process provides a complementary picture with that outlined previously. This model offered by Zuber-Skerrit provides practical interpretation of Action Research, but does not provide an appropriate degree of detail for interpretation. It does however offer a practical understanding of the Action Research process (2001).

The challenges of Action Research are that the key question or area of focus needs to be appropriate. It is also important that this process of research is consistent. Marquardt (2004) suggests that the process *'tackles problems through a process of first asking questions to clarify the exact nature of the problem, reflecting and identifying possible solutions, and moving only toward consideration of strategies and possible action'.*

The question process provides a commonly shared understanding of the issues. These issues provide the fundamental challenge. Each stakeholder in the research process carries with him or herself an understanding of what defines the current situation.

However, the nature of Action Research is that there is a constant evaluation of the *'answer'* to the question, which allows for a re-examination of the situation.

It is through initial start-up workshop that the situation definition and question determination process is to be undertaken and thus, resolved. The project work is therefore undertaken within the context of a collectively agreed concern. A midway specialist workshop offers a project review and ensures that the process remains on track and the key questions will be addressed and answered. The project assessment allows for the process to continue on track.

The concluding workshop gives confirmation of the resolution of the concern and ensures that the expectations of all the stakeholders have been met. This agreement is presented to the participants of the process. The presentation and celebration allows for the completion and resolution of the process.

5.1.2. Grounded Theory

With the Action Research paradigm, Grounded Theory was used as the methodology. Grounded Theory was chosen because induction, as a concept, is complex. Therefore, simple cause and effect relationships are inappropriate and do not truly represent the true nature of the subject. Grounded Theory allows for the complexity and is not trapped by the theoretical frameworks developed in the past.

Grounded Theory is an approach that can *'explore, describe, understand, and possibly explain the complexity' of the subject matter'* (based on Hylander, 2003: 266). Because a methodology is needed that can truly explain the complexity of the subject and provide a new perspective on a well-established field of study, Grounded theory is the most appropriate (Glaser, 1967). The fundamentals of Grounded Theory methodology was explored and is detailed in Appendix A: Grounded Theory (Page 102).

5.1.3. Grounded Theory and Action Research

Grounded Theory is an iterative process that is inductively derived through the specific studying of the 'phenomenon' (Strauss and Corbin, 1990). This iterative nature works in partnership with the Action Research to develop a theory from the ground up. Action Research is complex as it includes variability and changes throughout the research and this research is supported through its iterative nature. Grounded Theory allows for the development of the induction model and for the incorporation of contextual needs, as well as the adaptation of the process to meet the situation and concern.

5.2. Techniques

There are a number of techniques that have been used in this research process, namely the methods of data collection and the Causal Loop development.

5.2.1. Data Collection Methods

There were three data collection methods used, namely

a) Asking Questions

The questioning process was achieved in two parts, Interviews and Workshops. The interviews were one-on-one interviews, all conducted with the same interviewer to ensure consistency in data collection (Neuman, 1997: 333). The candidates selected includes as a cross-section of the staff: racially and gender. The selection process was done to ensure an appropriate experiential cross section as a prime focus as was a 'purposive' sample or the knowledge and experience base of the persons interviewed (Krueger, 1998: 70). These information rich participants are key as they have a complete understand of their own or others induction experience. The interviews were all written rather than recorded interviews thus ensuring confidentiality. The questions are detailed in Appendix C.1. List of Interview Questions (Page 135) and a list of the first interviewees is detailed in Appendix C.2. List of Initial Individuals Interviewed (Page 137). At no time were the participants in any physical, psychological or legal harm (Neuman, 1997:446-8). There was no deception, either in the interviews or data verification process. This was achieved through active disclosure of the process and the intention behind it (Neuman, 1997:449).

At all times, the data gathered was shared as a collective, with no reference to individuals. The persons interviewed were recorded to ensure participation in the verification process, but this was not shared with other parties (Neuman, 1997:452). Sample data from the initial interviewees is can be found in Appendix C.3. Sample of Interview Data (Page 138). The stakeholders then reviewed the data in a facilitated workshop process, consisting of a cross-section of staff. These workshops allowed the verification of the data. The outputs from the workshop can be found in Appendix C.4. Feedback Sessions: Interview Feedback Sessions & Project Scoping (Page 152).

b) Documentation

The documentation used as data included the Company Reports, and the Company's Intranet. This data was then incorporated into the analysis workshops. Examples of this documentation can be found in Appendix C.5. Design & Document Inputs (Page 159).

c) Observation

The Participant Observation data collection meant the involvement of the author in the initial induction process. This meant full participation in all exercises and tours. The challenge was to avoid any bias in the analysis. This was avoided through the inclusion of a consulting intern in the participation and the control and verification of the interview process and the stakeholder workshops.

5.2.2. Causal Loops

The development of the causal loop diagram started off with the use of descriptions as a foundation of development. These descriptions formed the basis of the model of induction, which was to be used to outline the weakness in the current induction model. It is important to note that it can be argued that the descriptions used to develop the model are limited as they are highly subjective. The input of the stakeholders into the descriptions reduces this subjectivity. These descriptions are grouped together, using the stakeholders' perspective to create categories and themes in order to create an affinity diagram. The themes were developed through an evaluation of the feedback from the interviews and the workshops as the primary source, with the secondary source were the business requirements as stressed by the Learning Department. The sources provided the foundation for the sorting of the data into categories looking to reduce the information into a maximum of eight categories prior to the finalisation of the affinity diagram. Repetition formed the key sorting criteria in the category development. The affinity diagram formed the basis for the development of the causal loop. In order to ensure rigour, these documents were discussed with the stakeholders during the development of the causal loop. However, the use of whiteboards and non-permanent recording methods limited the presentation of these working diagrams in this research.

5.3. Scientific Method

The scientific method is used in the development of management theory and comprises of five major steps:

- *'Observations of the external world'*
- *'Formulation of theories based on these observations'*
- *'Design and conduct of experiments to test these theories'*
- *'Comparison of experimental results predicted by these theories'*
- *'Rejection, modification or confirmation of these theories in accordance with the results of these comparisons'*

(Revans, 1982: 72)

In this research, the scientific method steps are fulfilled as follows:

- Observations of the external world: Through data analysis and participant observation
- Theory formulation: Development of an induction theory
- Experimentation to test theory: Various iterations of action research were undertaken to test and improve the induction model
- Comparison of results: Each iterations results were compared and reviewed, in order to improve both the model, but also verification of the process
- As a result, the theory could be confirmed as effective.

The scientific method allowed for the process to be regulated and managed to achieve the required results.

5.4. Conclusion

This chapter provided a description of the methodological and theoretical framework that underpins this research. This framework involves the examination of the methodology choices made and the theoretical justification for the research.

Chapter 6: Application

6.1. Introduction

This chapter explores the response to the research question detailed in the previous chapter. The chapter begins with the implementation that leads to the answering of the question. This implementation results in the development of a theory of induction presented in the latter half of this chapter.

6.2. Research Boundaries & Context

6.2.1. Application of the Research Framework

The project began with scoping process as an initial assessment, which was an initial meeting with the organisational project lead. The author began the investigation into induction. This allowed for the examination of the initial concern and the development of the research question.

The initial challenge of the process was the consultant's definition of the actual client. The question was asked whether the Company, the Head Office or the group of inductees were the client. After discussion between the various consultants, it was agreed that the primary client would always be the Company, specifically the Head Office. The secondary clients would be both the business units and the learners themselves. It was agreed that the balance would be maintained between the various clients, both from a business perspective, meeting the business needs and requirements, and from the learner's development for a longer term than their current position.

It must be acknowledged that the research in this context is a management research process. Management research is open ended in nature and the problem definition is part of the research process and the focus is meeting the business needs in resolving a specific organisational problem.

In this context, the initial nature of scoping was redesign of the induction-training programme. The initial project plan was re-scoped after the initial diagnosis, the assessment of the current induction process, was deemed to be inappropriate, ineffective and costly in terms of time. This assessment was done by the project lead based on feedback received from the various stakeholders in the initial diagnosis.

6.2.2. Assessment of the Status Quo

The verification of the initial diagnosis was conducted with a full review, including participation in the existing induction programme. This started the data collection phase and began with the review of the existing programme. The data collection was made up of the following data sources:

- Participant observance through the attendance of the original induction programme.
- Documentation including the review of all the documentation provided in the programme.
- Interviews with the role players and induction participants.

These data sources were qualitative as this provided a rich source of data. The client saw the pool of quantitative data as weak. Therefore, the focus was qualitative.

The assessment's objective was to consider which components of the programme were effective and met the objectives laid down in the project scope and addressed the problem statement and which areas required changes.

6.3. Research Process

6.3.1. Understanding the Situation and Concern

The existing induction programme was a two day process, starting with one day of presentations from managers and team leaders. These presentations were approximately 45 minutes in length and allowed for questions, of which few were asked. The presenters were senior managers with little available time. These presentations were supported by a file of data and information and were seen by the participants as being in conflict with the presenters. The feedback was that the presentations were boring and frustrating.

The second day of the programme was spent on tours of two key parts of the business and allowed the newcomers the opportunity to see and understand these parts. The feedback was that the tours were well received, but the participants were frustrated with the lack of interaction between themselves and the *'tour guides'*.

Overall, the review of the data resulted in general agreement that the presentations at times were outdated and contradictory. Some participants even suggested that *'they would catch on their sleep'* as they were bored. According to the participants, the files they were given, would probably not be used or reviewed the files unless necessary.

The assessment of the current situation allowed for the original proposal and project scope to be re-examined. As a result, the stakeholders (HR department / project liaison and the consultants) agreed that the scope of the project needed to be widened to include the induction process as a whole. This completes the initial phase of action research cycle. This phase is detailed in Figure 8: The Initial Phases of Induction Development Process (Page 63):

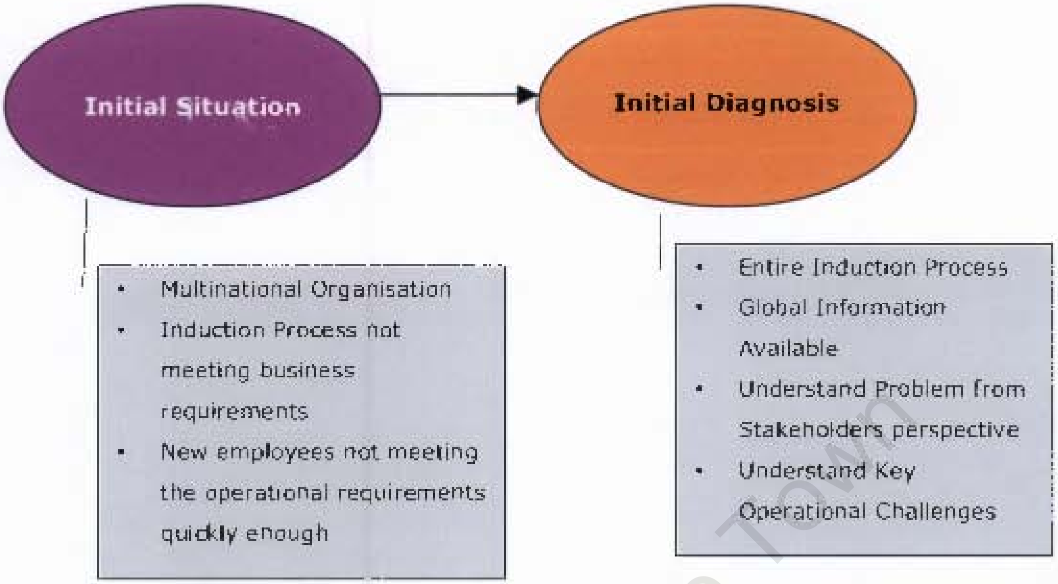


Figure 8: The Initial Phases of Induction Development Process

6.3.2. Stakeholder Interviews

The choice of stakeholders focused initially on the process owners, namely the HR and Learning department (separate departments, with a strong relationship). The process owners were given a mandate by the Company to represent their interests in this project. The challenge was that consultants were also stakeholders. The stakeholder roles for the consultant were numerous. Initially, this role was as the project coordinator and programme designer. However, this role expanded to include the facilitator in the formal induction programme. This was a challenge due to the operational requirements of the project, but the use of additional implementations with different facilitators alleviated any concerns regarding this situation.

The implementation of the methodology was initiated by interviewing the various stakeholders, 15 individuals in all (all based at the head office), representing 2% of the workforce at the Head Office (This is detailed in 3.1.1. Stakeholder Interviews (Page 5)). The interview questions are detailed in Appendix in Appendix C.1. List of Interview Questions (Page 135). The additional offices in the rest of the country were seen as a second phase of the project.

The primary data collection process was interviews of individuals chosen at random in consultation with the learning department to ensure a relevant and appropriate cross-section of people. The staff interviews were focused on the individuals' experience during their introduction to the organisation, especially looking at what they would have liked conducted differently and the learning they would have wanted to receive. The line manager interviews examined both their experience, as well as the desired learning and experience of their staff members. The data and feedback provided sufficient detail to develop an understanding of the themes and present these back to a representation of the stakeholders. The data ordering was completed prior to the data analysis. A list of the initial interviewees is C.2. List of Initial Individuals Interviewed (Page 137) and a sample list of the interview data C.3. Sample of Interview Data (Page 138).

6.3.3. Data Presentation (Start Up Workshop)

This data was analysed and compiled into themes and into a picture of the current situation and the desired perspectives of the various interviewees. This was presented back to the participants, as well as a number of additional persons in a facilitated workshop. This provided an opportunity to clarify and agree the objectives for the process and ensure the process had buy-in from the agreed stakeholders and allowed for the starting of the contracting process. An initial model was then collectively developed with inputs from the participants. The model developed focused on the following two components:

a) Knowledge Development of new employees

Knowledge of the Company and the Industry, as well as knowledge to perform the employee's new job, illustrated in Figure 9:

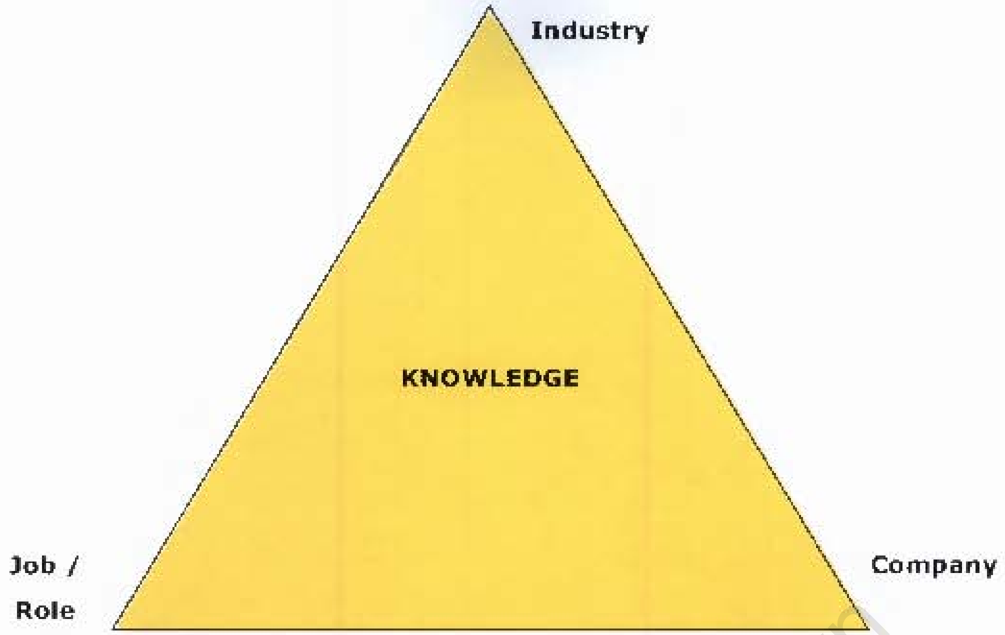


Figure 9: Knowledge Components in the Induction Process

b) Skill Development of the new employees

Skills to cope and manage the employee's new position and to manage oneself as an individual and cope with the changing working environment illustrated in Figure 10:

Figure 10: Skill Components in the Induction Process

This provided the framework to develop an integrated process focusing on the employee's first year within the organisation. The model was developed out of the workshop and was presented back to the original stakeholders. The model is illustrated in Figure 11:

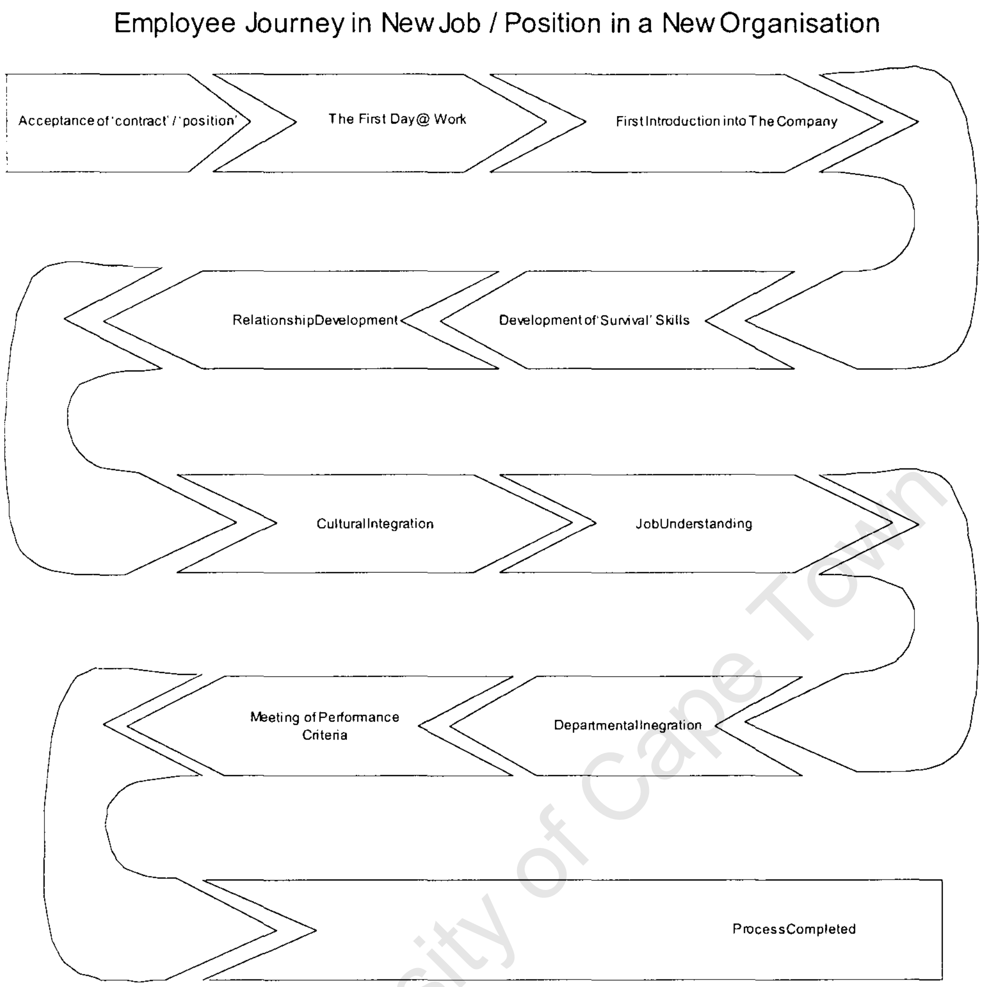
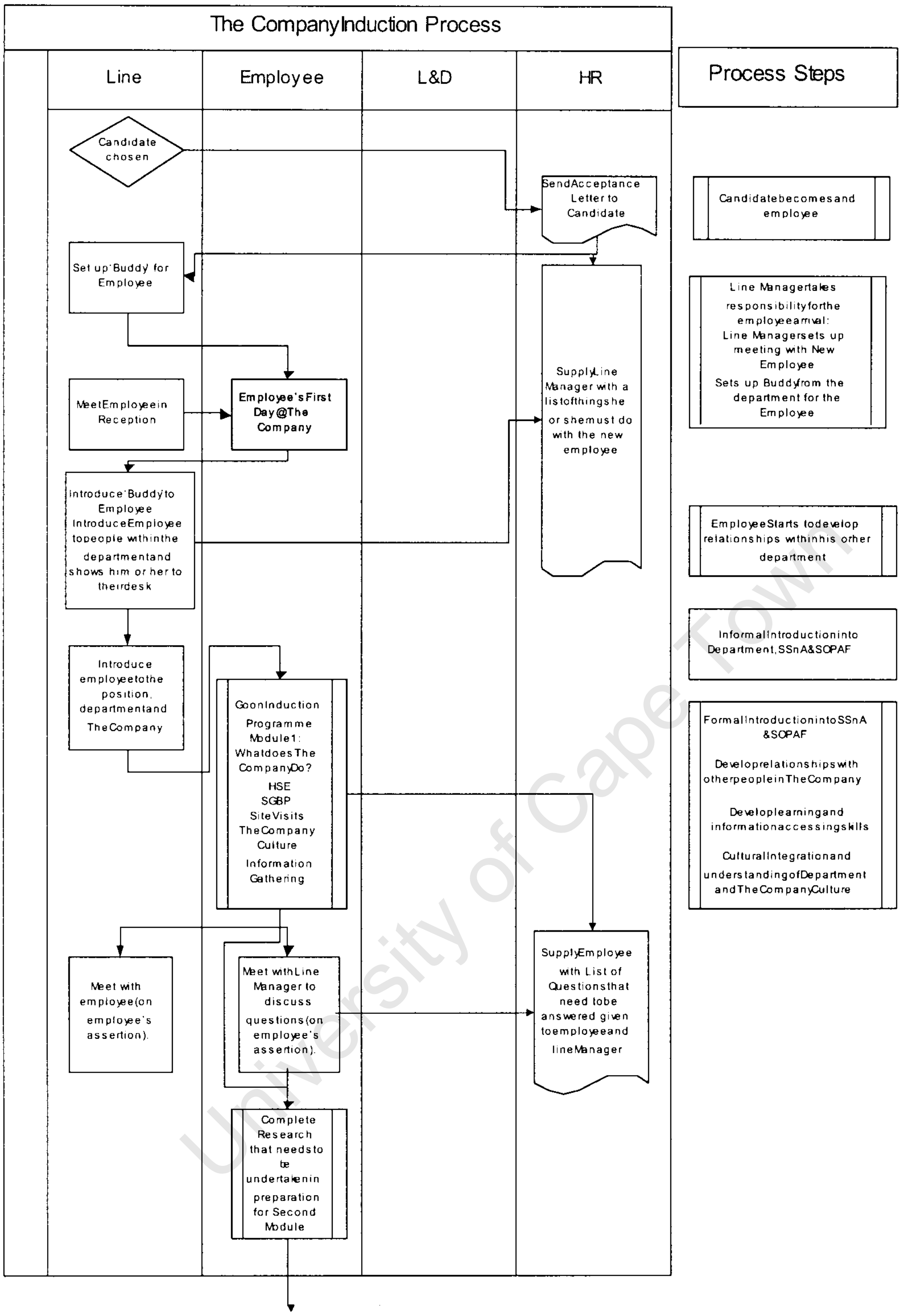


Figure 11: Overall Induction Process Design

The original stakeholders signed off on the above detailed overall induction design. Thereafter, the consultants developed a more detailed process, which was also presented back to the original stakeholders. This is detailed in the two pages that follow in Figure 12:


The Company Induction Process
Line
Employee
L&D
HR
Process Steps
Candidate chosen
Send Acceptance Letter to Candidate
Candidate becomes an employee
Set up 'Buddy' for Employee
Line Manager takes responsibility for the employee arrival:
Line Manager sets up meeting with New Employee
Sets up Buddy from the department for the Employee
Supply Line Manager with a list of things he or she must do with the new employee
Meet Employee in Reception
Employee's First Day @The Company
Introduce 'Buddy' to Employee
Introduce Employee to people within the department and shows him or her to their desk
Employee Starts to develop relationships within his or her department
Informal Introduction into Department, SSnA & SOPAF
Introduce employee to the position, department and The Company
Go on Induction Programme Module 1: What does The Company Do?
HSE
SGBP
Site Visits
The Company Culture
Information Gathering
Formal Introduction into SSnA & SOPAF
Develop relationships with other people in The Company
Develop learning and information accessing skills
Cultural integration and understanding of Department and The Company Culture
Meet with employee (on employee's assertion).
Meet with Line Manager to discuss questions (on employee's assertion).
Supply Employee with List of Questions that need to be answered given to employee and line Manager
Complete Research that needs to be undertaken in preparation for Second Module

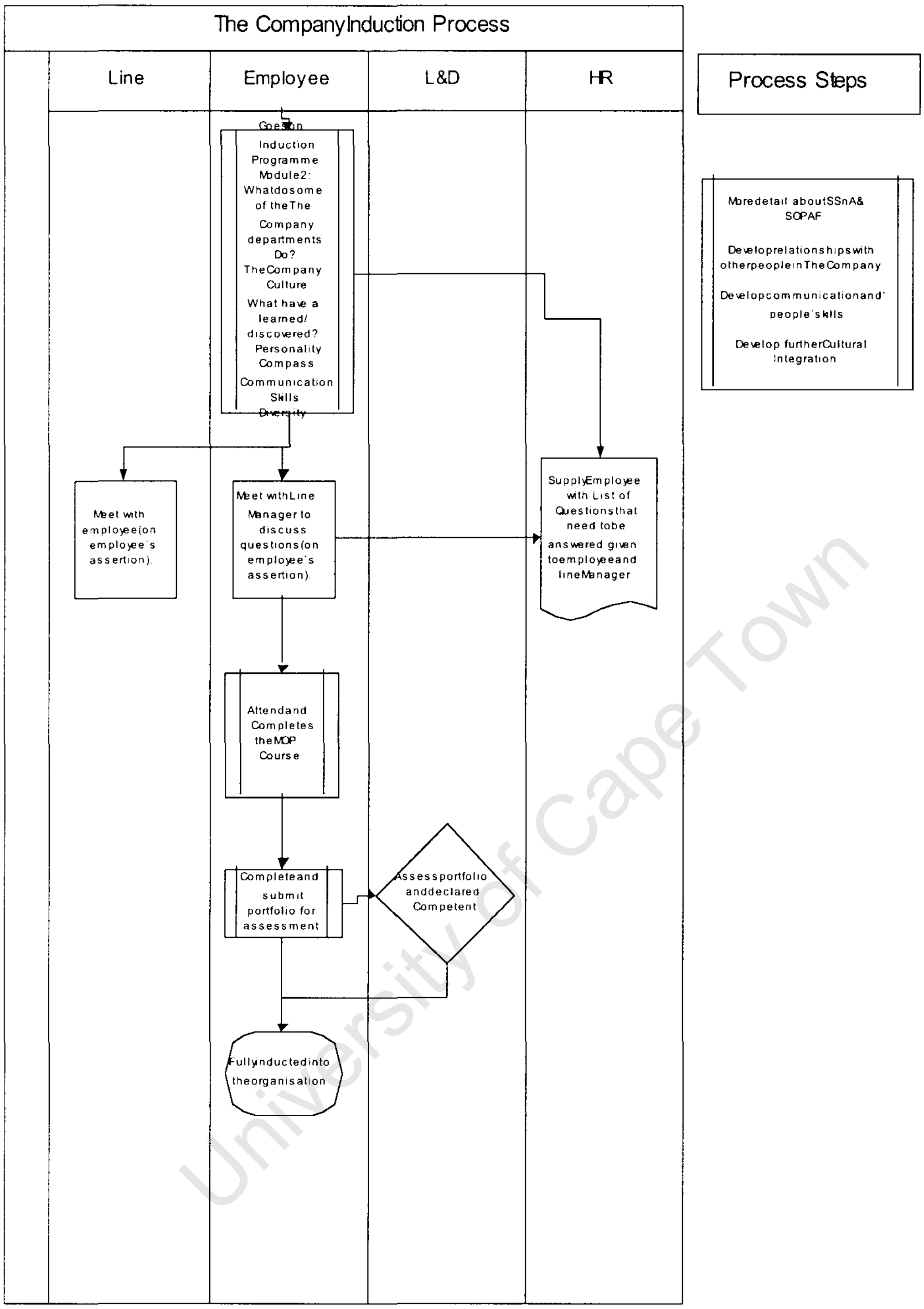


Figure 12: Detailed Induction Process Design

At the joint requirements workshop the outline of the induction process was presented to the stakeholders. This allowed for the agreement of the parties regarding this design. Feedback was heard and this allowed for the presentation of the enlargement of the original scope and hence re-scoping with the stakeholders. The stakeholders confirmed the new scope and also allowed for the development of an action plan to take the project forward. The workshop itself involved the examination of the data both from the interviews and the joint requirements workshop, looking at the questions of the Company and those of the various stakeholders interviewed. The workshop allowed for the agreement between the various stakeholders as to the purpose and objective of the programme and hence the new scope. This presentation is available in Appendix C.4. Feedback Sessions: Interview Feedback Sessions & Project Scoping (Page 152).

Data was grouped into categories representing the requirements of the process and the individual who was seen as inducted. This allowed the process to focus around the specific requirements. The grouped categories are as follows:

(i) Company Specific Information

- Detail Company Values
- Organisational Culture
- Know the basics – where to find things
- Provide an overview of Company and the business – in terms of process – are business and support functions people know how the organisation works, and the interplay between departments
- Understanding of HSE (Health, Safety and the Environment) in Company
- Not discourage diversity – to be your own person with the culture

(ii) Job / Employee Specific Information

- Employee Role in Company and Expectations
- Deal with expectations of new employees
- Take away anxiety and put people at ease
- The right decision has been made in joining the Company
- Gained a detailed knowledge of job expectations
- Reached performance stage

(iii)Departmental Specific Information

- Introducing the person to the right people and info. sources
- Know the right questions to ask, where to go
- Orientate HO, the physical structure of the building
- Line management role is to take and invert it information the detail from their department

Examples of this information can be found in Appendix C.5. Design & Document Inputs (Page 159).

(iv)Overall

The data analysis paved the way for the development of the following induction process model detailed in Figure 13:

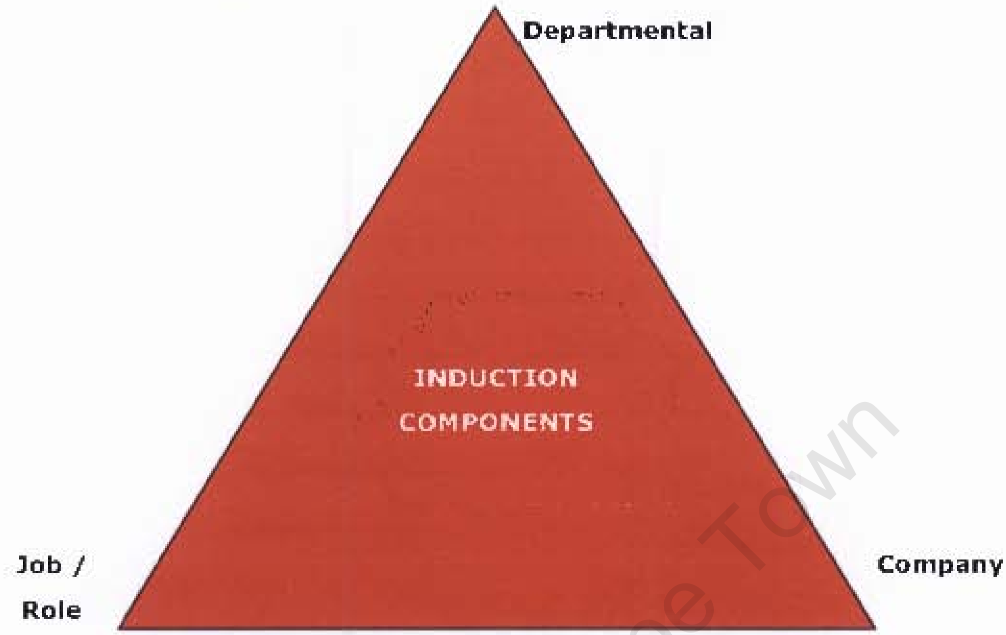


Figure 13: Induction Components

The data was then used to define a well-inducted individual, specifically in the context of the organisation:

- Confident with emotional well being regarding the arrival into the organisation
- Have the ability to find and process information with respect to the organisation and the business, their department and their new position
- Possess the ability to ask questions and know whom to ask, namely learning skills
- Customer and profit focused and possess an understanding of the organisational values and culture
- Ability to change and adapt to a changing environment
- Reduction of the time and cost to integrate into the current position

This data was then used to compile the causal loop diagram, which defined the process undertaken to oversee and dictate the induction process at the organisation (The Causal Loop is in Figure 1: Causal Loop Diagram of issues relating to the initial induction process (Page 7)).

This resulted in the development of an induction model appropriate for the organisation, as detailed in 6.5. Induction Model (Page 79) and involved the understanding of the role players in the induction process, which included:

- Senior Line Manager
- Line Manager
- Graduate Recruitment Coordinator
- HR Manager
- Consultants

The process also agreed to the need for induction and an understanding of the key messages from these role players. The process also examined the challenges the project faced and explored the overall nature of the project. The process was compiled into the following model and was discussed with the role players:

- **Skills Development (One Month)**
    - Principles of Learning
    - Culture Model
    - Change Management
    - Changes at The Company in the near future
    - Communication Skills
    - Corporate Philosophy
- **Information Transfer and Support (Six Months)**
    - Group Facilitation
    - Organisational Integration
- **Ongoing Process (1 Year)**
    - Mentoring (Line Manager or another appropriate individual)
    - Job Challenges
- **Tools Required**
    - Information Booklets / Websites – Important for Line Managers
    - Acronym Buster
    - Who is whom in the organisation
    - IR Information
    - Single Reference Point for information
    - Office / Building Information
- **Monthly Presentations (not necessarily for new people)**

6.3.4. Action Research Implementation Phases:

The outputs from the workshop then formed the basis for the data management process and the foundation for the action phase. The Action Research Testing phase begins with the development of the problem question. This question is addressed through the Action Research in an iterative process. The implementation of the model is dependent on the organisation and the Action Research process allowed for the development of the most appropriate induction process for The Company and allowed for appropriate participation from the relevant stakeholders.

The workshop also provided an opportunity to address a number of the key challenges that were expected due to the complexity of the process and the diversity of the stakeholders. These are detailed as follows:

- Managers being too busy
- Meet outcome of induction in a cost-effective manner within a specific time frame

a) Parts of Development Process

- **Line Manager and Stakeholder Workshop (Midway Specialist Workshop)**

At the end of Phase 2 of the testing (Page 73 onwards), the review process was undertaken with a selection of the stakeholders. The feedback was positive from the participants and the stakeholders. The process included the first presentation of the process guides for the following parts of induction:

- Overall Process Guide
- HR Guide
- Learning Guide
- Induction Coordinator Guide
- The New Employee Guide
- The Line Manager / Supervisor Guide
- The Buddy Guide
- The Learning Facilitator's Guide

In addition to the stakeholder workshop, the process included a workshop with a selection of Line Managers. (Sample data can be found in Appendix C.6.2. Line Manager Outputs Examples (Page 171)). The selection of Line Managers was small; the challenge was the available time of the Line Managers. The feedback from the Line Managers was positive and encouraging. The outputs are detailed as follows:

- Concentrate on the basic things – they are quite important
- Formalise introduction
- Teaching other where / how to find information
- Reduce pressure on line managers to provide answers
- Enforce learning through investigating
- Buddy / Mentor

- Sharing information with other newcomers
- It should cover the Company vs. the outside world
- How visible is the Company
- The diversities in the Company (This is not a sole propriety business)
- Understand your department and the 'Company Culture'
- The course needs to cover the basics and not much about a single department as it might create confusion
- Always refer and communicate with the new employee to make sure they are comfortable
- Line Manager has a key role to play
- Create a 'sense of belonging' in the mind of the new employee

This information was then incorporated into the next phase.

b) Testing Iterations

Examples of the information from the testing iterations is available in Appendices C.6. Inductee Process Plan (Page 165)

- **Induction Process and Workshop Design: Phase 1: (Initial Process and Workshop Design)**

The process entered the phase in which the overall induction process was developed and the learning module or workshop was tested with a number of newly recruited inductees. The development continued the design of the learning and skill process, which was a core building block. The focus of the workshop was a learning process designed to develop the skill and a portion of the knowledge required to meet the expectations of the process and assist the new members of staff to become more efficient and effective in their new positions. The induction process design was completed outlining the roles, responsibilities and functions of each of the various role players. The process involves the following stakeholders:

- HR
- Learning
- Induction Coordinator / The Learning Facilitator
- The New Employee
- The Line Manager / Supervisor

The initial role of the mentor and buddy was left out of the initial process. The initial workshop design was as follows:

Knowledge Development of new employees:

The knowledge focused on organisational culture and values. Time was spent on tours to develop understanding of some of the core parts of the business and a selection of the

Company acronyms. The site visits were continued, but with questions and interaction developed.

Skill Development of the new employees:

Skill development involved developing learning skills and have an opportunity to practice these skills. The challenge was to develop these learning skills so that the learners would be able to develop and facilitate their own learning and not be dependant on the facilitator or their line manager.

- **Induction Process and Workshop Design: Phase 2: (Redesign)**

The first workshop was redesigned and adjusted. It was implemented with the positive feedback from the newcomers and the line managers. A key comment was the workshop was too busy and it was requested that the workshop be spread over a longer period. The challenge was to address the concerns of the line manager with respect to the length of time that the newcomer would be away from his or her desk. In addition, the line manager wanted to develop a greater degree of organisational knowledge, specifically regarding the various parts of the organisation and policy understanding.

As a result, the next phase of the review process involved a number of the participants and stakeholders in the initial development workshop, the focus was the design and it was agreed to move towards an inter-modular system. The review process also included discussions with the head of the Graduate recruitment and selection process. He wanted to include a number of graduates in the next process and wanted to address some of the core issues in preparation for the new graduates, which was an examination of the issues of diversity within the Africa wide organisation.

Phase 2 was run on two separate occasions. The first time was with a large cross section of new staff. The feedback was positive, but the group appeared to be too large. The second occasion, the group was smaller and was mostly filled with graduates. The challenge was developing with the multi-modular process and inter-modular work. Newcomers were struggling to get the necessary time off from work through their Line Managers. In addition, not all the participants were completing the necessary inter-modular work. It was agreed with the learning department that this was their responsibility and should they not do so, their learning would be the issue in question. No one else would be taking responsibility for the process.

The Phase 2 feedback allowed for the expansion of the area of work in which the learners would be involved in. Therefore, it was agreed with a selection of the stakeholders, that the process would include the following:

Knowledge Development of new employees:

The knowledge development continued to focus on the organisational culture, a selection of the Company acronyms and the corporate values. Once again, the site visits were continued, but with less time at each site and questions and interaction with the participants further developed. In addition to the understanding of the various components of the business, the Company's policies and procedures were made part of the learning. A core additional component was the presentation of the Africa wide organisation and it's structure.

Skill Development of the new employees:

Skill development involved developing learning skills. The skill development was expanded to include communication and diversity management.

- **Induction Process and Workshop Design: Phase 3: (Minor Adjustments)**

The review process was incorporated into the next phase. In addition, the author held a review process with Prof Sylvia Downs, a retired Professor at Leeds University, who is an expert in Learning. She supported the developed induction process, but offered the feedback that '*new employees are not always comfortable with asking questions and facilitating their own learning'* (Downs, 23 Feb 2004, supported by Supervision, May 2001).

As a result, the process was amended as follows:

Knowledge Development of new employees:

The knowledge development continued as previously designed. However, some changes were made due to changes in the content over the passage of time and organisational changes.

Skill Development of the new employees:

Skill development was adapted to address the need for questioning skills. These questioning skills were added to the learning skill development.

- **Induction Process and Workshop Design: Phase 4: (Johannesburg – Different Site Implementation)**

Phase 4 was run in Johannesburg to address the orientation requirements in other parts of the business, but also to ensure that the process was rigorous. The alterations to the process were focused on time and not content as the Learning design was proving to be effective.

A key challenge that emerged was the change in the employee's status between the first module and the second. In this phase, two members of staff were reassigned due to organisational restructuring and one was unable to attend due to operational challenges.

However, the learning was evident through the feedback from the participants. They described their own learning at the workshop, in the post-workshop feedback, detailed below, and the feedback from their line managers. A post induction feedback process was developed to assess the process. The following questions were asked of the participants one month after the induction process was completed:

- What was your experience in the induction programme you attended?
- What was your greatest learning in the process?
- What was your greatest frustration in the process?
- What did you need from the induction process that you did not get?
- How has the induction process changed the way in which you work?
- Do you feel that the induction process has made you more efficient and effective in your job and in what way do you think this has happened?
- Do you feel that the induction process has reduced the length of time it will take you to be fully component in your new position in The Company? (If you could put some numbers to illustrate the length of time that would be valuable).

Van Der Merwe suggests that evaluation be completed three months after the process, but this was considered too greater a length of time (1978).

This information was used in conjunction with the learnings received at the end of the second module. The challenge was the lack of response from the participants. Response rates were less than 10% but the feedback was positive and encouraging. The process was not amended from a Knowledge or Skills Development approach.

- **Induction Process and Workshop Design: Phase 5: (New Learning Manager – Project Change Redesign)**

The next process change occurred within the organisation as a new Learning Manager was brought into the position as part of a restructuring process. The new Learning Manager was not part of the original scoping process and wanted to be part of the actual running of the workshop to understand the project.

Some minor changes were made during the process, but once again these were information updating and time management issues. Once again, retaining individuals as part of the modular gap was proved to be difficult and three individuals dropped out. In addition, operational constraints on the participants' time proved to be an increasingly difficult problem. Having staff out of the office and away from their work for four days over a month, plus the inter-modular work was a challenge.

The inter-modular learning was shown to be effective based on the feedback from the participants during the workshop. The learning outputs were seen as useful and allowed for responsibility and ownership to be taken by the learner. Once again, the learners were asked to complete a post induction questionnaire. The lack of responses continued, with response rates at less than 10%. However, the feedback was positive and encouraging and reinforced that the need for the process to be re-examined as a number of original aspects of the process had changed. These factors were influencing the design of the induction process and were a challenge to induction process as a whole. These are as follows, but are discussed in more detailed in Chapter 7: Evaluation (Page 95):

- Corporate Politics and Head Office Impact
- Scope Changes and Business Needs Changes
- Lack of Corporate / Line Manager Buy-In
- Time Constraints

- **Induction Process and Workshop Design: Phase 6: (Development Programme – Different Implementation)**

A division of the Company was undertaking a development programme, bringing in individuals from disadvantaged backgrounds to develop them into independent contacts for the Company over nine months. The induction process design was used as part of this process for 12 new inductees. Appropriate adjustments were made to the process. These included the updating of the material to address business changes, but also changes to meet the specific departmental requirements. The author did not facilitate this process and this proved to be an additional control evaluation of the workshop design. The feedback from the participants was very positive, however, more research needed to be undertaken as to their overall success as they had been in their training programmes for a short period of time, which is not sufficient for a realistic self-assessment. The overall evaluation upon the completion of the nine months and subsequent business commencement is that the induction proved a key part of their success.

Adjustments to the process were required to the current induction process to meet the needs requirements given the different group of inductees:

Knowledge Development of new employees:

The knowledge development continued as previously designed with adjustments to include areas such as more detail on Health, Safety, Security and the Environment (HSSE) and more specific technical skills required for the position.

Skill Development of the new employees:

The skills development continued as previously designed with adjustments to include areas such as customer service and basic staff management.

- **Induction Process and Workshop Design: Phase 7: (Traditional Implementation)**

The final implementation for this research process was a dual implementation at the same time. The dual implementation was for comparison of the impact in a traditional working context, with participants based around the country, coming to Cape Town for the learning process.

The feedback from the participants was positive and their enthusiasm was noticeable. The dual process with mixed participants allowed for comparison between the processes. The most noticeable feedback from the process regards the key learnings of the inductees, which focused on the learning and behavioural skills of each of the inductees. The feedback was such that no adjustments were required to the process.

- **Summary**

The seven iterations provided a realistically accurate view of the process and it's success. Each iteration provided additional justification and increased refining of the process. The difficulties were the constraints that existed with the process:

- Time Constraints
- Participants Constraints
- Operational and Business Constraints
- Scope Constraints
- Cost Constraints
- Induction Process Choices

It is evident that the process could require further iterations of the action research cycle in order to complete the process, but this is to truly measure the long-term impact, both positively and negatively for the inductees and the organisation.

6.3.5. Author's Reflection on the Process

The overall process took place over 20 months and the success can be measured by the impact. The short term impact on the inductees appears positive with feedback from the line managers (through telephonic interviews), the new employees (through emailed feedback) and the response from the learning department (through meetings) was all positive. The organisation is currently exploring the usage of the process within the rest of Africa.

6.4. Casual Loop

The research answer has been developed through the use of a causal loop. This casual loop provides the reference for the key driving factors and outcomes that the organisation faced and linking this concern with the research question and therefore provides the data and the assessment of the answer to the question. This casual loop is represented in Figure 14:

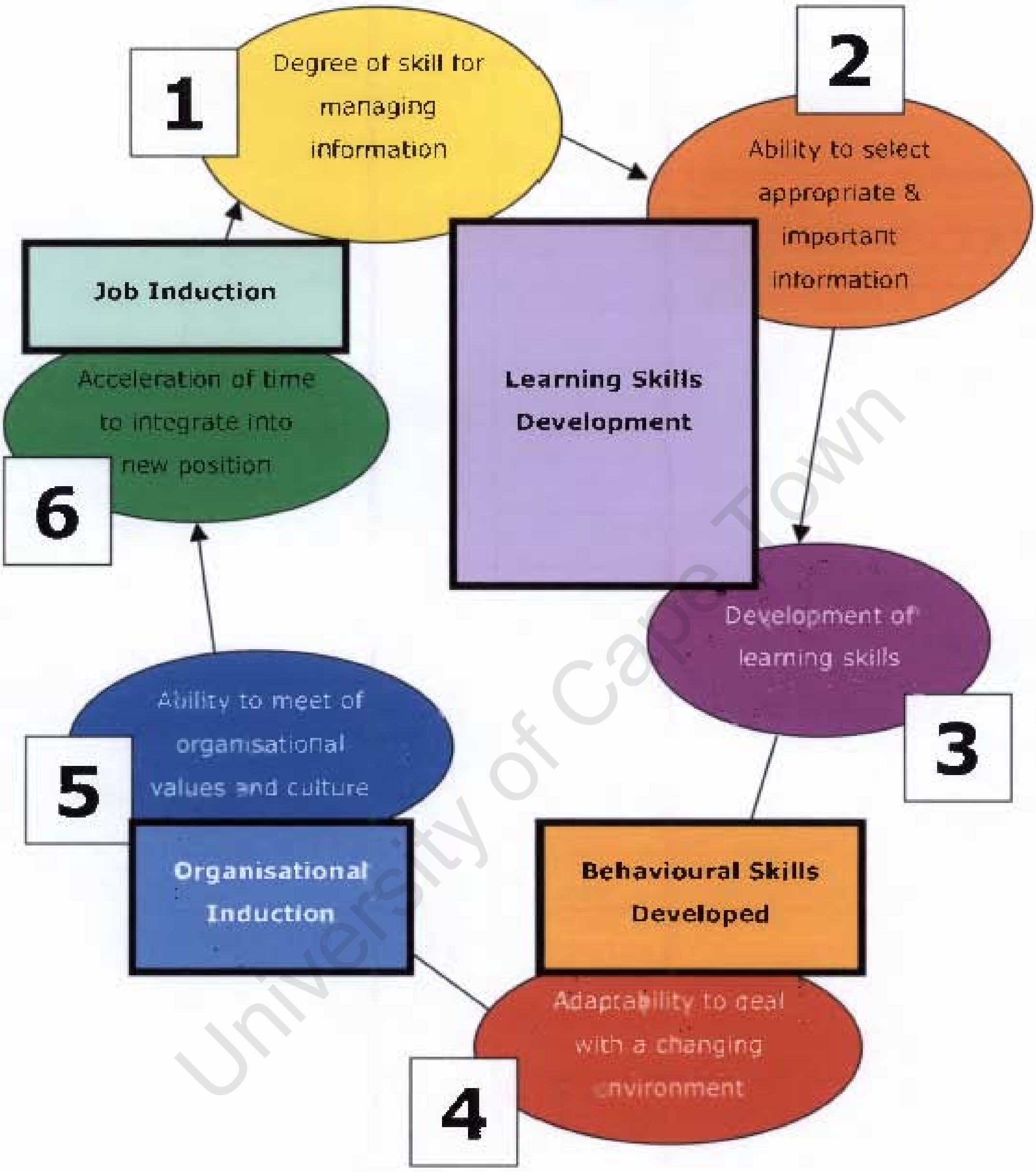


Figure 14: Causal Loop Diagram integrated with the Induction Process

6.5. Induction Model

This section is concerned with the presentation of the induction model, developed in this research. The model is developed within the context of the research situation, as a result of data collection and analysis, but with input from the theoretical perspectives. The research framework allowed for the developed of this model, which also answers the research question in a more general context and moves beyond an organisationally specific context.

6.5.1. Induction Model Building

a) Induction Impact

The detailed investigation of the causal loop variables (as detailed in Figure 1: Causal Loop Diagram of issues relating to the initial induction process (Reinforcing) on page 7) is undertaken looking at the impact of the induction on these specific variables. The variables are listed as follows:

- Degree of skill for managing information
- Ability to select appropriate and important information
- Development of learning skills
- Adaptability to deal with a changing environment
- Ability to meet organisational values and culture
- Acceleration of time to integrate into new position

The induction impact is then considered in more detail by exploring the key parts that make up the impact of induction. This research process did not allow for the above to be presented to the stakeholders as this was an overall model and not organisationally specific. However, the model itself was presented to the stakeholder group. Each of the variables are considered with respect to the organisation and individual impact:

(i) Degree of skill for managing information

The information described is from an organisational context. However, the individual employee receives it from the organisational collective. The information management skill is individually focused and driven. The impact is the skill of the individual. In the context of the organisational impact, the information is managed within the organisation. This variable has a relationship with the following impact variables already discussed:

Organisational:

- Assist with the implementation of systems
- Reduces Communication Breakdowns & Mistakes
- Influencing Present Staff
- Contribute to team development
- Monitoring the external environment

New Employee:

- Assist with Training and Development
- Create Positive First Impressions and Expectations

- Developing Confidence and Empowerment, but Reducing Anxiety and Fear and Motivating new staff

(ii) Ability to select appropriate and important information

With information selection, the individual impact is specifically an ability held by the individual. The organisational impact is focused on the information selection process. This variable has a relationship with the following impact variables already discussed:

Organisational:

- Improved Financial Position and Reduction of Costs
- Assist with the implementation of systems
- Reduces Communication Breakdowns & Mistakes
- Meeting the Requirements National Qualifications Framework
- Influencing Present Staff
- Contribute to team development
- Monitoring the external environment

New Employee:

- Increased Motivation of the New Employee
- Assist with Training and Development

(iii)Development of learning skills

The development learning skills has a dominant individual impact as they are for the development of the individual. The organisational impact is both with the ability of individual to learn without formal learning structures and the creation of a learning organisation. This variable has a relationship with the following impact variables already discussed:

Organisational:

- Assist with the implementation of systems
- Increase Employee Retention and Reducing Staff Turnover
- Meeting the Requirements National Qualifications Framework
- Influencing Present Staff
- Contribute to team development

New Employee:

- Increased Motivation of the New Employee
- Assist with Training and Development
- Create Positive First Impressions and Expectations
- Developing Confidence and Empowerment, but Reducing Anxiety and Fear and Motivating new staff

(iv)Adaptability to deal with a changing environment

The ability of the individual employee to deal with a changing environment puts him or her in a position where they can cope with the variability of the modern corporate environment. This ability to adapt has organisational impact as the individual ability to cope is shared by members of staff. This allows for the collective organisation to adapt the changing external environment. This variable has a relationship with the following impact variables already discussed:

Organisational:

- Assist with the implementation of systems
- Increase Employee Retention and Reducing Staff Turnover
- Influencing Present Staff
- Contribute to team development
- Monitoring the external environment

New Employee:

- Increased Motivation of the New Employee
- Assist with Training and Development
- Create Positive First Impressions and Expectations
- Developing Confidence and Empowerment, but Reducing Anxiety and Fear and Motivating new staff

(v) Ability to meet of organisational values and culture

The ability of the individual to meet the organisational values has an individual impact by enabling the individual to meet the expectations and requirements of the organisation. This also impacts the organisation as the members of the organisation apply the commonly held and shared values and culture. This variable has a relationship with the following impact variables already discussed:

Organisational:

- Increase Employee Retention and Reducing Staff Turnover
- Reduces Communication Breakdowns & Mistakes
- Influencing Present Staff
- Contribute to team development

New Employee:

- Increased Motivation of the New Employee
- Create Positive First Impressions and Expectations
- Developing Confidence and Empowerment, but Reducing Anxiety and Fear and Motivating new staff

(vi)Acceleration of time to integrate into new position

The acceleration of the integration of the individual employee into the organisation allows for the employee to feel more confident as he or she reaches the required standard. In addition, it enables their productivity and performance to reach the required levels at a faster rate, which has both organisational and individual impact. This reduces the cost of the individual's employment as the return on the investment of their employment and potential occurs at a faster rate. This variable has a relationship with the following impact variables already discussed:

Organisational:

- Improved Financial Position and Reduction of Costs
- Increase Employee Retention and Reducing Staff Turnover
- Influencing Present Staff
- Contribute to team development

New Employee:

- Increased Motivation of the New Employee
- Assist with Training and Development
- Create Positive First Impressions and Expectations
- Developing Confidence and Empowerment, but Reducing Anxiety and Fear and Motivating new staff

The above process links the casual loop variables with the induction impact variables and therefore insures the relationship between the components is theoretically sound. It must be acknowledged that it is not possible to have the impact of any induction process meet all of these impacts without financial and time constraints. The result of such a situation is that the objectives of the programme must be assessed in order to ensure the appropriate objectives are considered to ensure the desired impact.

b) Induction Objectives

It is appropriate to consider the overall objectives for the induction process in terms of the individual and the organisation. The impact of the induction is broken up into an individual and organisation is then used as the basis for the analysis of the objectives, highlighted below. (These objectives are reflected in detail in the Appendix B.2. Objectives for Induction (Page 115)).

The induction causal loop is integrated into the induction objectives. This creates an integration of the causal loop model and the induction theory. The challenge that such an integration is not always possible, however the research process has allowed for the accommodation of the differences:

- **Degree of skill for managing information**
  Developing Working Skills
- **Ability to select appropriate and important information**
  Developing understanding of Health, Safety, Security and the Environment (HSSE)
  Revealing and Honest about Potential Pitfalls and Past Mistakes
  Gaining Organisational Information
- **Development of learning skills**
  Developing Working Skills
- **Adaptability to deal with a changing environment**
  Acclimatising to the New Environment
- **Ability to meet of organisational values and culture**
  Familiarisation with the Organisational Culture, Values and Indoctrination of the Organisational Philosophy
  Ability to understanding the Bigger Picture
  Building Relationships, Networking & Engaging in Teamwork
  Holding Regular Assimilation and Process Review Meetings
- **Acceleration of time to integrate into new position**
  Understanding of the New Position and Role, including within a Team Context
  Clarifying Expectations
  Making Staff feel Valued and Important
  Ability to Handle the with the Stress of a New Position
  Increased Productivity
  Improve Morale & Motivation
  Modelling the Desired Behaviour

There are a number of objectives that do not fit into the causal loop diagram and these are generally more organisationally focussed. It is the author's argument that these objectives have an indirect influence on the various parts of the causal loop and therefore are treated outside the formal causal loop discussion. These are broken down into two parts, the general organisationally focused objectives:

- Improving Staff Retention
- Creating a Learning Organisation
- Challenging to the Status Quo

The remaining objectives are particular and focused on very specific areas within the organisation:

- Getting a Picture of Future Opportunities
- Addressing Technical Issues
- Using Coaching Resources

Given the inter-relationship between the induction causal loop and the objectives of the induction process, the issue is the induction approach that should be adopted to ensure the meeting of these objectives.

c) Induction Activities

Given that induction is seen as a process, as apposed to an event, it can be agreed that the induction process is broken down into four specific parts. Part one is overall management of the induction process; part two concerns the pre-hire phase; part three is the immediately post-hire stage with part four being that which takes place beyond the first week and throughout the first year. Each component has activities that are emphasised. The list of the views of the main authors are reflected below, detailed in the Appendix B.2.3. Induction Activities (Page 124). These details are highlighted points, expressing the options available in an induction process:

(i) Overall Strategic

- Induction should be documented into a road map that allows for the newcomer to plan their own induction, but also to understand where the process is heading (Andersson, 2001). The induction process does assume a lack of knowledge and skill by all participants. The use of a modular approach allows for the new employee to skip ahead if necessary (Shutovich, 2003 & Shea, 1982).
- France and Jarvis (1996) suggest a workshop style learning opportunity for newcomers to develop an understanding in a collectively learning experience. As a collective learning experience, it provides the opportunity to create learning. The workshop should also develop skills of the participants. In part this assumes a low skill base of the incumbent employee, but it does ensure that all staff begin employment at the same skill level. Part of the skill development includes developing flexibility, learning and change skills in the participants, thus enabling them to adapt and change to the world around them.
- The learning process should also use informal learning opportunities outside of the workshop setting. This allows for the building of relationships and keeps the information more current and up-to-date.
- Inductees require more information pertaining to their job, as opposed to the organisation and this assists in their adjustments (Wanous & Reichers, 2000).

(ii) Pre-Hire

- The employee and the manager need to agree the psychological contract between the new employee and the organisation and therefore manage the expectations of both parties.

- A Welcome card is sent to the new employee's house, with a personalised brief message from all the team members (Hacker, 2004, also highlighted by Lindo, 1999, Robbins, 2002 & Goodberry-Dyck, 2003).
- Pass around details regarding the new member of staff, including a picture (Hacker, 2004 & Lindo, 1999). Give the new employee a 'crib' sheet of all the employees, assisting him or her on their first day or work (Lindo, 1999).
- There should be an assessment of the new employee training requirements and schedule the necessary training prior to their commencing work (Hacker, 2004).
- Documentation of the requirements for what is expected by the new employee during their first three months on the job, discuss these expectations with the employee during their first week (Shea, 1982, Hacker, 2004, Garvey, 2001 & Goodberry-Dyck, 2003).
- Define the limits of authority and the degree of flexibility in the position. The degree of flexibility refers to working context, and whether or not the individual has flexibility in hours and working from home etc, especially in the first three months. The limit of authority refers to the type of decisions that can be made without authority. This must be documented and detailed, including everything important and must be discussed with the new member of staff on their first day of work (Hacker, 2004).
- The company should provide the employee with a so called employee pack, which includes the employee handbook, the relevant job description, performance evaluation forms, information regarding the history of the business and various payroll and benefit forms (Hacker, 2004, Garvey, June 2001, Robbins, 2002, Lindo, 1999, Shea, 1982, HR Briefing (Aspen), 2001, McConnell, 2003, Merit, 1999 & Leadership for the Front Lines, 2001).

(iii)First Day or Immediately Afterwards

- The new employee should be greeted in person (Merit, 1999), by the employee's direct supervisor and the employee's departmental manager (Hacker, 2004, Garvey, 2001, Robbins, 2002, Leadership for the Front Lines, 2001, Shea, 1982 & Goodberry-Dyck, 2003). A meeting for the new employee to meet the rest of the staff should be setup (Lindo, 1999). A meeting needs to be scheduled between the new employee and the direct supervisor to discuss departmental operations and goals (Leadership for the Front Lines, 2001, Merit, 1999 & Penzer, 1973). A basic tour of the operation should be provided to orientate the new employee.
- It is also appropriate to consider the area of HSSE (Shea, 1982). Organisations have an obligation, sometimes dictated by law, to ensure that their staff are aware of the HSSE requirements in their new environment.

- There must be the opportunity to discuss the 'mission' and 'charter' of the organisation. However, in some respects, this should have been covered in interview process; but it is debatable. This includes culture, values and beliefs of the organisation (Lindo, 1999 & McConnell, 2003). This can include departmental goals.
- The new employee needs to develop an understanding of the departmental operations and requirements including roles and responsibilities of the various individuals in the department, reporting standards, management structures and working patterns
- Computers, passwords, email addresses, access cards etc, need to be in place on or before employee's first day (Shea, 1982 & Connor, 2002, Garvey, 2001 & Benefits for Law Offices, 2001).
- It is suggested that new members of staff be involved in team meetings as soon as possible (Hacker, 2004). This enables them to get into the 'swing of things' quickly and get involved.
- It is seen as beneficial to give the new member of staff his or her job description as quickly as possible. This helps in answering any questions or tackling any concerns or problems early, and ensures the new employee understands what is practically expected from him or her (Leadership for the Front Lines, 2001, Robbins, 2002, Merit, 1999 & Goodberry-Dyck, 2003).
- The beginning of the new job should be made a celebration. This involves creating a celebrative atmosphere and ensuring the new member of staff is productive as soon as possible (Hacker, 2004, Lindo, 1999, HR Focus, 2001: & Goodberry-Dyck, 2003).

(iv)Final or Post – Hire (Within the First Year)

- Additional information should be presented on the legal nature of the employment relationship and the laws that govern this relationship need to be addressed (Leadership for the Front Lines, 2001 & Office Pro, 2000).
- A discussion regarding the new employees training requirements is important. This examines their areas of development that would make them more productive and efficient in their new position, focussing specifically on the gaps (Hacker, 2004, McConnell, 2003, Leadership for the Front Lines, 2001 & Strategic HR Review, 2002).
- Introduce the new recruit on all appropriate office equipment, as well as providing a place or individual to answer any questions or address any concerns regarding the equipment (Hacker, 2004 & Robbins, 2002).
- Share the documented job requirements prepared for the employee prior to their hire. By having the requirements written and sharing them in a discussion, both parties are aware of the practice expectations (Hacker, 2004 & Robbins, 2002).

- The buddy or mentor system is introduced. Members of staff are paired with those who have been there for a while (Hacker, 2004, Robbins, 2002, McConnell, 2003, Mahoney, 1969 & Davies, 2001).

6.5.2. Parts of Induction

a) Organisational Induction

Organisational Induction focuses on the induction of the individual employee into the organisation and also examines the organisational structure, values, policies and the culture. In terms of impact, the organisation has a great deal of impact due to the introduction of the well-designed and appropriate induction processes.

b) Departmental Induction

Departmental Induction focuses on the induction of the individual employee into the department in which he or she will be working. This includes the manner in which things are conducted in the department, as well as the departmental culture and other departments with whom he or she will be interacting.

c) Job Induction

Job Induction examines the induction of the individual into his or her new position and looks at the tasks and key performance areas of the position, allowing the new employee to understand the standards and measures against which he or she will be evaluated.

d) Behavioural Skill Development

Behavioural Skill Development focuses on the behavioural skills (also known as the soft skills) required to meet the performance requirements of the organisation, department and position. There are behaviours that are seen as important, but are not necessarily possible to recruit for, or for the behaviour to be at the required standard or the required manner and therefore developing those skills is most appropriate.

e) Learning Skill Development

Learning Skills are developed to allow the individual the opportunity to cope and manage the unexpected and changing environment. These skills also develop adaptability, which reduces the need to develop each detail of the new job and individual's future career.

6.5.3. Role Players

The next part of the model examines the role players, each providing a role and function in meeting the requirements of induction. Each role provides a specific function in each of the parts:

a) HR / Learning

Human Resources and Learning departments are responsible for the overall management of the induction process. They are the process sponsors and accountability holders.

b) Induction Coordinator

The role and function of the induction coordinator is a specific role within HR / Learning department. This individual oversees the induction process and coordinates the activity around the process.

c) The Learning Facilitator

The learning facilitator facilitates the learning of the inductees. This function is built specifically on the learning 'events' or workshops designed as part of the acceleration to meet the induction requirements. This forms the foundation for the induction process.

d) The Line Manager / Supervisor

The Line Manager or Supervisor provides knowledge and support to the new employee. This involves assisting with his or her integration into the department and job through one-on-one sessions and providing assistance for the inductee as and when required.

e) The Mentor

The role of the mentor is to facilitate the inductee's development and provide 'wise council'. This role is to accelerate the learning and development of the inductee, specifically with regarding to management skills and behavioural areas.

f) The Buddy

The role of the buddy is to offer assistance and knowledge to the inductee and provide a sounding board and perspective on *'the way things are done around here'*.

g) The Organisation

The Organisation, as a collective, is a part of induction, as there needs to be buy-in and support for induction. Without such buy-in the process will not be effective.

h) Other Learners

During the formal induction learning process, the new employee interacts and learns with and through other learners, as well as vice versa. These other inductees have a role in agreeing to share their knowledge and assisting in the skill development of each other.

i) Other Employees

Other employees assist the new employee with their learning about the organisation and sharing their knowledge and experience.

j) The New Employee

The new employee is the primary focus and upon whom the biggest induction impact is seen. The individual is required to take responsibility for his or her own learning.

6.5.4. Induction Parts

There are three parts to the induction process, the formal group learning process, the formal self-directed, and the informal learning process:

a) Group Learning

The group learning or formally organised learning process takes place in a workshop context. The focus is on the behavioural and learning skill development and developing an understanding of the organisation. The group learning is broken up into two modules. The first module is the understanding of the organisation, developed using learning skills the inductee is introduced to. The second module allows the learner to complete the self-directed learning initiated between the two modules and practice the behavioural skills learnt in both.

b) Self-Directed Learning

The self-directed learning process is designed to allow the learner the opportunity to develop his or her knowledge outside of the formal group-learning environment in a structure and organised manner. This occurs through the interaction between the individual and the role players within the organisation. The structure is provided through a carefully designed process provided during the group learning. In order to ensure the learning is managed effectively, the self-directed learning happens between the two parts of the group learning. Included is an understanding of the organisation and the inductees own department.

c) Informal Learning

The informal learning process allows for the learning to be undertaken within the workplace and without formal guidance. This involves the learner using learning skills he or she has developed and using these skills and facilitate learning by engaging the role players. The focus of the informal learning is the incumbent's new job or the job induction and more detailed departmental induction. This informal process does not have a time constraint, but rather is limited only by the learner and the role players. It provides an opportunity for the learner to take control of his or her own learning.

6.5.5. Components of the Induction Process

There are various components of the ideal or model induction process. The components are assigned to the various parts of the induction process.

a) Organisational Induction

- Gaining Organisational Information
- Acclimatising to the New Environment
- Familiarisation with the Organisational Culture, Values and Indoctrination of the
- Organisational Philosophy
- Developing understanding of Health, Safety, Security and the Environment (HSSE)
- Ability to understanding the Bigger Picture of the Organisation

b) Departmental & Job Induction

- Understanding of the New Position and Role, including within a Team and Department Context

c) Behavioural Skill Development

- Building Relationships, Networking & Engaging in Teamwork
- Ability to Handle the with the Stress of a New Position
- Modelling the Desired Behaviour

d) Learning Skill Development

- Developing Working Skills
- Revealing and Honest about Potential Pitfalls and Past Mistakes

e) Additional Components of the Induction Process

- Clarifying Expectations
- Making Staff feel Valued and Important

- Increased Productivity
- Improve Morale & Motivation
- Holding Regular Assimilation and Process Review Meetings

6.5.6. Time Process across Induction Process

The induction model takes a view of the inductee's journey within a time frame of a single year. This year is broken down into four parts: an overall strategic view, a pre-hiring phase, first arrival and finally within the inductee's first year.

a) Overall Strategic

The overall strategic component involves the induction road map, which outlines the strategy plan for the induction process. This plan is underpinned by Modular-based Learning, with formal and informal structures using collective, workshop style learning, self-directed components, and the recognition of the prior learning. This includes the skill development of the participants and creating flexibility, learning and change skills.

b) Pre-Hire

Pre-hiring focuses on the preparation for the new member of staff from the organisation's perspective. This includes preparing the line manager for the arrival of the inductee and preparing the inductee for their arrival into the organisation. Such preparation includes contractual agreements, both written and psychological between the parties and the management of all expectations.

It is a number of small, but powerful activities that impact the individual inductees. These are driven by the line manager and include welcome cards with personalised messages from the line manager and the rest of the team, providing a detailed tour of the operation, giving the new employee a pack of information regarding his or her new team, and all administrative details he or she requires. The line manager also sends a detailed message about the new team member to the current team. The line manager will also provide appropriate training and learning assessment in order to prepare the inductee for the technical part of his or her position, should this be appropriate.

Part of the pre-hire process is the definition of the initial limits of authority, job scope and flexibility for the inductee so he or she is fully briefed as to the nature of their position prior to commencement on day one.

c) First Day or Immediately Afterwards

The inductees first day requires a greeting in person by his or her line manager and introduced to the members of the department and to all Health, Safety, Security and Environmental (HSSE) requirements in the position. On the first day, operational tools are presented to the inductee, including computers, desks, cellular or mobile phones, etc.

Informally, between the inductee and the line manager, they develop an understanding of the departmental operations and requirements including roles and responsibilities of the individuals in the department, reporting standards, management structures and working patterns. This also includes the understanding of the job or task, specifically looking at key responsibilities and performance areas of the inductee. This goes so far as to document expectations for the first quarter of his or her new position and involvement in team meetings. The employee is presented with his or her job description and any questions are addressed, present the performance requirements are address and all documentation required is also completed. There is an introduction to the organisation and *'the way we work around here'*, including departmental operations and goals. This process then moves into the next and final phase of the process of induction.

d) Final or Post – Hire (Within the First Year)

The final or post-hire phase starts within the first quarter of the new employee joining the organisation. Within the individual's first quarter of employment, the formal group learning process begins. It is suggest this may be within four months ensuring there are sufficient participants for the group learning sessions. In this workshop, there is a more detailed look at the organisational and *'the way we work around here'*, including departmental operations and goals. The formal individual learning process is included as part of the induction programme.

The inductee is introduced to the legal obligations and implications for his or her new position and detailed learning requirements for the individual employee. He or she is fully briefed on all appropriate office equipment. The inductee and the line manager establish specific job or project goals so to ensure clarity of purpose. The inductee is also introduced to his or her buddy whose role is to offer assistance and knowledge to the inductee and provide a sounding board and perspective on *'the way things are done around here'.*

The inductee is introduced to his or her mentor, whose role is to facilitate the individual inductees development and *'provide wise council'*. This role is to accelerate the learning and development of the inductee, specifically with regarding to management skills and behavioural areas. The process is to slowly develop the inductee into becoming a fully functioning, efficient and effective member of the organisation and the team.

The induction causal loop is not based on a time constraint and therefore a relationship with the causal loop is difficult to document.

6.5.7. Conclusion

The research answer is complex, detailed and covered the relevant areas relating to the induction process that answered the research question. Therefore it can be said that it is possible to accelerate the assimilation of new staff members into the organisation through an integrated induction learning processes, ensuring the meeting of minimum operating practices using the above detailed process. This model was developed out of the detailed action research that developed an organisationally specific induction model. It was from this model that a generally applicable model was created. This answer and the models require a rationale and justification, which follows on from this chapter.

Chapter 7: Evaluation

7.1. Introduction

Evaluation of a project does require the consideration of a multitude of external and unknown parameters that would have affected the project. It is important that there is the consideration of the variables and the effect that they have had on the project and the outcome. The evaluation of this research project and process success begins with the assessment of the prime areas of evaluation.

7.2. Constraints and Challenges

There are a number of research constrains and challenges which need to be considered in order to fully evaluate the process:

7.2.1. Time and Operating Constraints

Time constraints proved to an increasingly problematic challenge in the Company. Line managers did not have sufficient time to spend with new employees and new employees did not have sufficient time to spend learning about the organisation as they had too much work to do. These constraints needed to be adapted to and arrangements were made to address the situation, where possible.

The process required over two years to complete. The time limitations involve time with the necessary stakeholders and time to develop the process, including time to ascertain the long-term results. These constraints were also part of the various participant constraints. The process did require new employees to enter the organisation on a regular basis. These new employees also required the necessary time off to attend the workshop. These operating constraints also limited the involvement of participants such as the line managers. This had a material effect, but this was addressed through the action research process and what the outcomes of the Action Research process meant a more detailed and thorough answer able to handle both the rigours of multiple applications, but also the rigours of analysis.

7.2.2. Scope Constraints

As the process and project developed, the changes within the organisation adjusted the scope. This had implications, as the project needed adjustment and changes throughout.

The option to do so was limited further by the operational and business constraints and personnel changes. In addition, the project scoping limited the process.

7.2.3. Cost Constraints

A key process constraint was the cost. The Company was paying for the implementation and therefore, the project was limited by an external budget over which the author exhibited no control.

7.2.4. Consultant's Constraints

The consultant's constraints included time, control and influence. The consultant on the project was limited in terms of time as to the number of iterations of the Action Research. However, sufficient iterations of the process were enacted to meet the project requirements.

Control and influence constraints were based on the ability to manage and facilitate the scope. These were limited due to the organisation requirements; the consultant's history and relationship with the organisation and the stakeholders did assist in this process.

7.3. Process Challenges

Within the development process there were a number of key challenges:

7.3.1. Corporate Politics and Head Office Impact

The Company is a multinational under going a great deal of change. Such change is taking place both at a business process level as well as a structural level. Hence, the constant change process resulted in constant evaluation and assessment of programmes and processes. Part of this process has included a Head Office requirement that did not allow for flexibility in the training content and methodology. This requirement put the induction development in jeopardy as the Head Office design has a different emphasis and approach, almost in conflict with the design adopted.

In addition, the change process made the measurement of staff turnover difficult, as approximately 25% of the head office faced early retirement or retrenchment. In addition, the organisation planned a geographical move of some of these divisions. According to the HR department, these changes precipitated increased staff turnover to 40%.

7.3.2. Scope Changes and Business Needs Changes

As the project took place over two years and the Company itself experienced incredible organisational and business changes, the requirements of the induction changed. The organisation has moved more Africa wide and the increasing demands on staff time emphasised the need for a change in the process and content.

7.3.3. Lack of Corporate / Line Manager Buy-In

The induction process required involvement from Line-Management and all levels management. The lack of buy-in as evident throughout the process and the Company and it was acknowledged that line management involvement was required. The lack of management buy-in proved to be incredibly difficult and limited the induction process. Part of the challenge was the number of line managers that needed to be integrated into the process. With the organisation having over 30 line managers, all with incredible time and travel constraints. It was increasingly difficult to meet the requirements of the process without further involvement from them. The initial involvement of the line managers was through the workshop run relatively early in the process and the participants were a limited representative sample. This needed to be extended throughout the Company, but once again a higher level of involvement was required. It is evident that as the organisation began to gain alignment and receive positive feedback, the buy-in from the Learning and Human Resources Departments has increased. This resulted in a desire to rollout the process across the African.

7.4. Action Research Assessment

The nature of these constraints and challenges did limit the overall effectiveness of this research. Nor did it limit the success, both in meeting both the organisational and action research requirements. In evaluation of the research project, Carr and Kemmis (1986 cited by Zuber-Skerrit, 2001) ask whether the follow areas were areas tackled:

7.4.1. Effective and efficiency of practice

The overall evaluation of the process must include a consideration of the practice adopted. The practice and process has been participative and complex with the number of role players involved. The emphasis was always focused on being effective and efficient in meeting the client's needs. This efficiency was measure both in terms of time and cost to the business.

7.4.2. Professional Development & Practitioner's Understanding

The evaluation of professional development can be considered in the organisational context of the consulting company involved. The consultants have all shared in the learning and development from this process, which has provided the consultants with experience. The author's own learning as the action research practitioner has been noticeable and as a result of the experience, he has become the organisation's expert on induction processes.

7.4.3. Transformation of their Consciousness and the Organisation

The transformation of the consciousness of the organisation is difficult to determine, as the long-term consequences of the research cannot be determined. The assumption, based on the casual loop and the research, suggests the long-term positive impact and transformation of the organisation. However, this is impossible to ascertain without further research.

7.4.4. Liberation from tradition, self-deception and coercion

The inductees were allowed the opportunity to challenge their preconceived ideas about learning. The impact of this was noticeable and mentioned by the inductees through their main learnings during the formal group learning sessions.

7.4.5. Their critique of the bureaucratic systematisation

This evaluation issue is not appropriate in this context. However, it is argued that a greater understanding of the organisation and the inductee's role therein will challenge the nature of the system.

7.5. Relevance

The evaluation of the relevance concerns the relevance of the concern within the context of the situation. The concern was expressed by the organisation and the diagnosis and original research allowed for the re-examination of this concern. As a result, through a workshop process there was shared agreement with the root definition of the problem. The shared nature of the concern allowed all the parties to be aware of the concern and work towards its resolution. The evaluation of the relevance can only be based around the original process and the impact thereof. It is the opinion of the author that despite the scope change in the project, the relevance can be seen to meet the context of the situation.

7.6. Utility

The question of utility focuses on where outcome or answer to the problem situation addressed the concerns originally expressed. The nature and complexity of the concern cannot be easily addressed by a simple answer. The evaluation must also consider as to whether the research has answered the research question put forward. Action Research focuses on the answering of the question, however the process developed and detailed herein does move towards a resolution of this concern. It must be acknowledge that the developing and changing nature of the situation and concern emphasises the need for an adaptable answer. The use of Action Research goes somewhat towards addressing the need for adaptability and the nature of the concern. In addition, the use of Causal Loops does move towards giving a holistic understanding of the model, even though full implementation is only partial possible at this stage. The participative and transparent nature of the process means that the answer does address the problem expressed in the concern.

7.7. Validity

The evaluation of validity assesses the rational of the argument of the answer. In this research process, the answer was developed through Action Research and Grounded Theory. This allows for a constant evaluation, albeit limited to the organisation in question. The process has been transparent and participative in order meet the rationale for the answer. In addition, the broad cross section of academic and theoretical justification has been done in conjunction with Action Research and Grounded Theory, provides validity to the research. The rationale has a justifiable validity that is supported by the outputs of the research.

7.8. Ethics

The ethics evaluation asks the question if the research was ethical. It is argued that the confidential approach is an effort to protect the organisation and the information disclosed herein. The protection of identity allows for the research to be seen as ethical. This confidentiality does create a number of problems, but the use of a nom deplume reduces this concern as it prevents public awareness of the organisation. Confidentially with individuals, as well as the groups has been kept sound at all times. The author has ensured this by being part of the entire process and keeping confidence. The process was participative and allowed for evaluation. This justifies the assertion that is that there are no ethical concerns with the research.

7.9. Author's Bias

An evaluation of the author's bias is considered in the context of the research and the use of a transparent and participative process allows for the constant evaluation by the client and fellow consultants. This ensures that any and all bias is limited.

7.10. The Challenge of using Action Research as a Consultant

A key challenge was the management of the Action Research as a consultant not an integral part of the Company itself and having no formal authority or power. In this context, the challenge is to gather the appropriate degree of flexibility within the organisational and get participation at the appropriate level. Flexibility is a challenge in the Company as there are specific requirements that exist from an organisational context. Participation is also difficult, as participation is not always possible due to operational requirements of the organisation. This reinforces the choice of facilitator's role in the Action Research process away from the emanipatory role, which is more collaborative, critical and self-critical (Zuber-Skerrit, 2001). The induction development does aim to change the consciousness of the organisation or to change the system itself (Zuber-Skerrit, 2001). However, these are not the primary aims of the process and therefore can be discounted in some respects.

The challenge in the Action Research is that it requires constant involvement of the participants, but this is not always possible in a corporation given the demands on the individual stakeholder's time. This is further exacerbated by the detail required and the expectation of the organisation that the consultant will 'handle all these issues'. As a result, the process is pressured to create an output, but is not necessarily willing to allow the process to succeed to achieve the required and desired output.

7.11. Conclusion

It is therefore argued that given the above evaluation, the process can be considered to be effective, relevant with high utility, valid and ethically researched. The research is deemed to be appropriate in the context and have answered and addressed the research question highlighted by the organisation.

Chapter 8: Conclusion

Induction and orientation are not *'nice to haves'* or options in an organisation. The justification and reason for being are so overwhelming; organisations cannot afford to ignore them as a resource. The benefits are important in making any organisation get the best out of their people. Cairo declares *that 'Finding good employees is too difficult - and too expensive - to let one go without a fight'* (cited by Supervision, 2001: 16). Klienman goes so far as to suggest that there is mounting *'evidence of a direct correlation between employee retention and increased profitability'* (2000: 15). Staff need to be looked after, new staff even more so. Klienman goes further to argue that organisations in the top of the list of the best companies to work for; all have great employee orientation programmes (2000).

This research process has emphasised the need for learning within the context of organisations, both as a collective and for the individual employee. Such learning begins from the arrival of the new member of staff, who starts with many expectations, trepidations and fears. It is beneficial, both to the organisation and the individual employee, both in the short term, but even more so in the long term; to provide an orientation programme to assist with the smooth entry of the newcomer into the new organisation.

The challenge is that organisations do not appear to see new employees as the focus for their human capital investment. Time and monetary constraints continually preventing employees from being suitably prepared to cope with their new working environment. John Browne, the CEO of BP comments *that 'Any organisation that thinks it does everything the best and need not learn from others is incredible arrogant and foolish'* (Steven E. Prokesch, 1997: 147). Organisation can learn and share learnings with their new members of staff, develop their skills and allow them to accelerate their productivity to meet their capability and potential. In order to do this, they require the appropriate preparation and investment. This begins from their first day of work.

Appendix

Appendix A: Grounded Theory

A.1. Grounded Theory Process

Grounded Theory needs to be explored in order to understand this research process. Grounded Theory begins with a general scope of inquiry, an area of discussion or field of study (Glaser, 1978 cited by Hylander, 2003). The research questions become more detailed as the research data and information becomes available (Hylander, 2003). Strauss and Corbin detail Grounded Theory as ' *a qualitative research method that uses a systematic set of procedures to develop an inductively derived theory about a phenomenon'* (1990: 24 cited by Neuman, 1997: 334). Newman goes further to say that *'the purpose of grounded theory is to build a theory that is faithful to the evidence'* (1997: 334).

Pandit (1997) describes the Grounded Theory as having three key parts. These are concepts, categories and propositions. The Concept is developed out of the conceptualisation of the data not the physical data itself. It is from this that the theory is developed (Pandit, 1997). This point is emphasised by Corbin and Strauss (1990: 7) when they state *'Theories can't be built with actual incidents or activities as observed or reported; that is, from "raw data." The incidents, events, happenings are taken as, or analysed as, potential indicators of phenomena, which are thereby given conceptual labels. Only by comparing incidents and naming like phenomena with the same term can the theorist accumulate the basic units for theory* (Pandit, 1997: 1-2).

The second component of the Grounded Theory process is that of categories (Corbin & Strauss, 1990). *'Categories are higher in level and more abstract than the concepts they represent. Categories are the "cornerstones" of developing theory. They provide the means by which the theory can be integrated'* (Pandit, 1997: 2).

The third component is propositions *'which indicate generalised relationships between a category and its concepts and between discrete categories'* (Pandit, 1997: 2). According to Pandit *'propositions involve conceptual relationships whereas hypotheses require measured relationships'* (1997: 2). These three components form the elements for the Grounded Theory. Grounded Theory also has six categories. Pandit (1997) details these categories:

- Research Design
- Data Collection
- Data Ordering
- Data Analysis
- Literature Comparison

A.1.1. Concepts

The first element under discussion is that of the induction concepts. The concepts are developed out of the conceptualisation of the data. These were developed through the investigation and data gathering process. The concepts are the principles upon which theoretical perspective is developed, in other words how will this theoretical picture be developed in this research context?

The concepts in question focus on the induction principles. These principles are that the induction model is a multi-role function to introduce and prepare new members of staff into the organisation and by doing so reduce the time period for new employees to become truly competent. This has the potential to reduce the costs of employing new individuals. These concepts form the foundation for the development of the Grounded Theory.

A.1.2. Categories

The second element is that of categories, which are defined as a higher and more abstract principle than concepts, but they represent the key components of the developing theory. The categories in the induction theory development process were as follows:

- Organisational Induction
- Departmental Induction
- Job Induction
- Behavioural Skill Development
- Learning Skill Development

These categories are seen as the parts that will resolve the problem statement. This problem statement was the foundation that facilitated the development of the Casual Loop, which is the process seen as resolving the following problem statement:
How can the Company accelerate the assimilation of new members of staff into the organisation through an integrated induction learning processes, ensuring

the meeting of minimum operating practices? If so, what process would be most effective in the context of the Company?

A.1.3. Propositions

The third element of Grounded Theory is the area of the propositions. Propositions generalise the relationship between the category and concepts. The result is the integration of the causal loop and its variables and the categories:

- Organisational Induction (Variable 5)
- Departmental Induction
- Job Induction (Variable 6)
- Behavioural Skill Development (Variable 4)
- Learning Skill Development (Variables 1,2 and 3)

These categories are then broken down into further detail, each possessing a specific 'sub-phase' with a corresponding activity and a detailed rationale behind the activity Pandit (1997) is detailed Table 2: The Process of Building a Grounded Theory (Page 104):

Table 2: The Process of Building a Grounded Theory

PHASE	ACTIVITY	RATIONALE
	RESEARCH DESIGN	
1. Review of technical literature	Definition of research question Definition of a priori constructs	Focuses efforts Constrains irrelevant variation & sharpens external validity
2. Selecting cases	Theoretical, not random, sampling	Focuses efforts on theoretically useful cases (e.g., those that test and/or extend theory)
	DATA COLLECTION	
3. Develop rigorous data collection protocol	Create case study database Employ multiple data collection methods Qualitative & quantitative data	Increases reliability Increases construct validity Strengthens grounding of theory by triangulation of evidence. Enhances internal validity Synergistic view of evidence
4. Entering the	Overlap data	Speeds analysis & reveals

field	collection & analysis Flexible & opportunistic data collection methods	helpful adjustments to data collection Allows investigators to take advantage of emergent themes & unique case features
	DATA ORDERING	
5. Data ordering	Arraying events chronologically	Facilitates easier data analysis. Allows examination of processes
	DATA ANALYSIS	
6. Analysing data relating to the first case	Use open coding Use axial coding Use selective coding	Develop concepts, categories & properties Develop connections between a category & its sub-categories Integrate categories to build theoretical framework All forms of coding enhance internal validity
7. Theoretical sampling	Literal & theoretical replication across cases (go to step 2 until theoretical saturation)	Confirms, extends, & sharpens theoretical framework
8. Reaching closure	Theoretical saturation when possible	Ends process when marginal improvement becomes small
	LITERATURE COMPARISON	
9. Compare emergent theory with extant literature	Comparisons with conflicting frameworks Comparisons with similar frameworks	Improves construct definitions, & therefore internal validity Also improves external validity by establishing the domain to which the study's findings can be generalised

The table details the process that the Grounded Theory will undertake. In this research context, the implementation outlines the Grounded Theory process.

A.1.4. Data Management Processes

The data management examines the collection, analysis and conclusions that can be drawn from the data process.

a) Research Design

Research design involves the design and development of the research in the given context. Research design has two components, the technical literature review and the selection of cases or research contexts. The review of the technical literature involves the defining of the research question and the priori constructs (Pandit, 1997). The process is about focusing the efforts and by doing so constrain the areas of irrelevance and inappropriate variation. It also supports the external validity of the process (Pandit, 1997). The selection focuses on theoretical sampling and looks at theoretically useful cases (Pandit, 1997). In Action Research, research design is focused on the initial situation and diagnosis. This initial project phase is designed to provide an initial picture or situational context.

b) Data Collection

Data collection starts with the development of a data collection protocol that is both rigorous and allows for the entering of the field for the data collection. This data collection protocol details the methods adopted to ensure the reliability and validity of the data. It strengthens the grounding of theory through the triangulation of evidence (Pandit, 1997). The process creates internal validity and integration, and interrelationship of the evidence and data (Pandit, 1997). The data collection focuses on the flexibility and nature of the process ensuring the adaptability of the protocol and allows for the process to examine emergent themes quickly (Pandit, 1997).

This phase examines and identifies the appropriate stakeholders and research participants and also begins the project entry and contracting phase ensuring that the various stakeholders have a common understanding of the project. Action Research also starts the data collection phase.

The decision to use qualitative research was based on the small volume of stakeholders and the need for complex and rich density of data. In addition, multiple approaches were used in order to ensure complexity and consistency of the data (Fortuin et al, 2002 & Dick, 2002). The selection was limited by the data collection process, which can be adapted during the process, using either one-on-one interviews, using a Convergent Interviewing Technique (Neuman, 1997), or Workshop Facilitation using a Focus Group style approach or Qualitative Questionnaire Approach (Neuman, 1997). In order to ensure an increased richness of the data and allow for the research to be more effective in ensuring the process was successful (Fortuin et al, 2002 & Dick, 2002), the selection of the stakeholders and participants for the initial investigation was based on the following criteria:

- Diversity
- The Data Collection Method
- The role of the person in the current situation
- Their physical location and availability

(Fortuin et al, 2002 & Dick, 2002).

The selection process of the stakeholders is determined and limited by the choice of data collection as well as organisational limitations.

c) Data Ordering

Data ordering focuses on the management and arrangement of the data (Pandit, 1997). This facilitates the data analysis and improves time taken to complete the task. The action research process takes the data ordering in the data collection phases of the model.

d) Data Analysis

Data analysis examines the data, starting with the initial situation and develops relationships and connections between the various components and variables, which is then developed into a theoretical framework (Pandit, 1997). In action research, this phase is the question and theory development process.

The data analysis moves into a theoretical sampling phase, which confirms, extends and sharpens the theoretical framework (Pandit, 1997). The data analysis process starts off with the use of the themes and variables as a foundation of development of the theoretical framework. In Action Research, this represents the testing and reflection phase.

In this research, the approach adopted to develop the theoretical themes was causal loop diagrams. The causal loop diagrams focused on creating a generic model that could be applied to any organisation. Causal loops provide flexibility for comparison with other induction models, even though these models are seen as limited and context specific.

The process involved gathering of the data from the interviews and organisational information grouping the data into categories, then creating statements regarding induction. The relationship between the various categories was unpacked. The causal loop was developed from this information, providing the foundation for the development of the induction model. The casual loop diagram is used as part of the foundation for the development of the theoretical framework specific to this context. This model is then use as the foundation for the overall process.

The data analysis ends when the iterations of development process become immeasurably small and the closure is reached (Pandit, 1997). This represents and illustrates the iterative nature of Action Research.

e) Literature Comparison

Literature comparison focuses on the comparison with the current theoretical literature. The principle is to compare the conflicting and similar frameworks and improve the construct definitions and reinforcing the validity of the process (Pandit, 1997). In action research, this process is about the comparison between the developed theory and the current theoretical perspectives. This is not formally part of Action Research, but forms part of the process none the less.

Appendix B: Induction Theory Detail

B.1. Induction Impact

This section is looks at of the impact of induction, both in the contexts of the individual and the organisation:

B.1.1. Improved Financial Position and Reduction of Costs

A commonly shared perspective of induction authors regarding induction is that it has a positive financial impact on the organisation. This impact starts with the acknowledgement by a number of authors that an induction process can reduce unnecessarily large staff turnover costs (Hacker, 2004, Meighan 2000, Compensation & Benefits for Law Offices, 2001, HR Briefing (Aspen), 2001, Chancey, 1968, Garvey, 2001, Managing Training & Development, 2002, Lee & Reuschling, 1973, George & Miller, 1996, Strategic HR Review, 2002, Kennedy, 2001, Klienman, 2000, Jauch & Sekaran, 1978, Hicks (Editor), 2000 & Robbins, 2002).

An additional financial impact is that it also reduces the cost of mistakes as the probability of the occurrence of the mistakes is lowered (Hacker, 2004, Day & Cohen, 1988 & Robbins, 2002). *Strategic HR Review* (2002: 5) illustrate this perspective by citing a study of the call centre industry that stated that *'a tenure of less than 12 months [was] problematic, considering the resources invested in training and the length of time needed for the employee to become an effective operator'. Managing Training & Development* (2002) make reference to Cambell and Company who managed to reduce their employee turnover by 60% in a single year through an integrated induction process as well as reductions in errors in performance.

A further financial impact is suggested is that the induction process can reduce risk within the organisation. *HR Briefing (Aspen)* (2000) suggests that an indirect benefit of the orientation process is the management of the risk of the organisation from potential liability. *'A meaningful orientation program can be a critical component of an effective risk management program that protects a company from employment practice liability,'* notes Jerry Maatman (cited by HR Briefing (Aspen), 2000: 6).

Maatman goes further to state that *'the theory is that if you invest money in your workforce and workplace by having state-of-the art policies and procedures, starting with orientation and going all the way through termination, you can become what is know as 'an employer of choice.'* This quotation suggests that orientation or induction programmes can add a direct value to the organisation's ability to employ the best talent. This is because individuals would rather work for an employer of choice, because that company is viewed as fair and offering the best benefits, both direct and indirect. Employees feel that even if the company doesn't always agree with them, it still listens and is responsive to their concerns' (cited by HR Briefing (Aspen), 2000). The financial impact is great as it creates an increase in the quality of talent available to the organisation.

B.1.2. Increased Motivation of the New Employee

A key impact on employees who participate in an induction process is a higher probability of a longer-term commitment to the organisation (Meighan 2000, Office Pro, 2000, Shea, 1982, Compensation & Benefits for Law Offices, 2001, Rock, 1993, Lee & Reuschling, 1973, Hicks (Editor), 2000 & Robbins, 2002). *'Ensuring that new employees get the support they need is critical to keeping your employees motivated to work for you for the long haul'* (Hacker, 2004: 89). *Office Pro* (2000: 3) argue that *'Effective orientation programmes, where new employees are introduced to a company's mission and made to feel part of the team, are key to sparking early productivity…'*. Rock takes the process further by suggesting that *'employee orientation is analogous to customer orientation'* (1993: 35).

B.1.3. Contribute to team development

Induction allows for new members of the team to be integrated into the team in a structured manner (Meighan 2000, Day & Cohen, 1988, Mestre, Stainer & Stainer, 1997 & Kanouse & Warihay, 1980). The joining of a new individual into a team naturally upsets the status quo. Induction facilitates the return of the status quo, albeit in a different form thus contributing to team development. Day and Cohen argue that orientation processes create a sense of belonging, which facilitates team building and effectively brings the new employee into the new team (1988). Orientation programmes can even go so far as to *'increase the rate of development and degree of quality within a team'* (Day & Cohen, 1988: 23).

B.1.4. Assist with Training and Development

The induction process is the new employee's first experience of training within the new organisation. It is therefore important that it makes a good impression (Meighan 2000 & Hicks (Editor), 2000). In addition, the induction process provides an opportunity to develop the appropriate and required skills for the new position, including behavioural and technical skills (Strategic HR Review, 2002, Robbins, 2002, Goodberry-Dyck, 2003 &

HR Briefing (Aspen), 2000). Such an investment in the new member of staff's development helps reduce the sense of anxiety and fear about the expectations and requirements of the new job and the potential of not meeting those requirements (Office Pro, 2000 & Goodberry-Dyck, 2003).

B.1.5. Monitoring the external environment

The new arrivals provide an effective opportunity for the organisation to gain detailed knowledge about the perception of them externally (Meighan, 2000). Such an option can be seen as both misleading and misguided as individuals who join the organisation are individuals who have *'bought'* the brand of the organisation. However, it is argued that they may offer additionally unknown perspectives.

B.1.6. Influencing Present Staff

Induction can benefit the present staff as they are part of the induction process (Meighan, 2000). Such a perspective is limited to their direct involvement in the induction process. However, it is argued that new individuals entering the organisation can have a positive influence, bringing in new energy and passion, as well as new insight. The potential extra responsibility involved with inducting new staff also creates a momentum and enthusiasm within the present staff (Meighan, 2000).

B.1.7. Assist with the implementation of systems

Meighan argues that induction can assist with the implementation of quality systems (2000). Mestre, Stainer & Stainer state that orientation can help with quality implementations such as Total Quality Management (1997). It can be further argued that this can involve any system implementation. Induction allows for a system to be introduced to new staff without the negative attitudes, concerns and feelings that traditionally come from current staff. This is dependant on the experiences of the new staff; however, the motivation to adopt the new system is seen as higher given their new arrival.

B.1.8. Create Positive First Impressions and Expectations

Hacker argues that first impressions count (Hacker, 2004, also discussed by Lindo, 1999, HR Briefing (Aspen), 2001, Garvey, 2001, Kennedy, 2001, Andersson, 2001, Hicks (Editor), 2000, McGillicuddy, 1999 & Klienman, 2000). Hacker adds that *'managers can create an organisation in which employees are more productive and to which they feel* *more connected'* (Hacker, 2004: 89) and that *'poor orientation efforts not only on the present, but also your future recruitment efforts'* (Hacker, 2004: 89).

Kline and Peters (1990: 226) offer the model of behavioural commitment to the organisation, in that the individual employee becomes *'psychologically bound'* to the organisation. This commitment represents a personal obligation *to 'follow through on the implications of their actions'* (Kline & Peters, 1990: 226). In this context, they talk about commitment to the organisation and *'implies a willingness to maintain a continuing relationship as members of an organisation'* (Kline & Peters, 1990: 226). Their research suggests that new employees each have a different level of commitment to their new position; this can be both managed and elevated during the job decision-making (i.e. recruitment) and the induction processes.

Orientation gives new members of the organisation a sense of purpose; it gives them the *'why'* for their position and the tasks they perform (Robbins, 2002 & Leadership for the Front Lines, 2000). The challenge is that during the interview and recruitment process, the organisation has been *'sold'* to the new employee and therefore, the expectations of the new employee are high, possibly unrealistic (Lindo, 1999). This is especially important when considering the perceptions of the new employee and the principles of employer brand. The employer brand is the branding that the organisation has as an employer. The brand perception and reality of the organisation can differ and this creates a situation of brand dissonance. The challenge of the expectations of the new employee is the meeting of such perceptions with the employee's experience. New employees who leave within the first six months state that the job did not meet their expectations (George & Miller, 1996). The question is what are the expectations from both parties and how can they be shared and discussed. The new employees need to have the quality of performance and performance standards by which they are measured, explained to them (Hacker, 2004, Robbins, 2002, Shea, 1982, Hicks (Editor), 2000 & Supervision, 2001).

Schein (1964) suggests that the breakdown in the relationship between the employee and organisation is due to the needs of both parties not being met. As mentioned, the challenge is that the expectations of the employee are often unrealistic due to the nature of the recruitment and *'selling'* of the organisation during the interview process (Lindo, 1999). However, through communication, both parties can be aware of what the other's expectations are.

B.1.9. Increase Employee Retention and Reducing Staff Turnover

A key impact of any induction programme is increasing the staff retention within the organisation (Hacker, 2004, Leadership for the Front Lines, 2001, HR Briefing (Aspen), 1999, HR Briefing (Aspen), 2001, Compensation & Benefits for Law Offices, 2001, Office Pro, 2000, Shutovich, 2003, Robbins, 2002, Chancey, 1968, Garvey, 2001, Managing Training & Development, 2002, Lee & Reuschling, 1973, George & Miller, 1996, Leadership for the Front Lines, 2000, Kennedy, 2001, Klienman, 2000, Jauch & Sekaran, 1978, Hicks (Editor), 2000, Day & Cohen, 1988 & Strategic HR Review, 2002).

Induction and orientation allows the organisation an opportunity to *'sell itself'* and reassure new employees that they made the *'right decision'* (Leadership for the Front Lines, 2001: 7). Simply put, the most obvious benefit for the improvement of the staff turnover is the reduction is recruitment costs (Meighan 2000). Recruitment costs can be over 25% of the new employee's annual salary package (Lindo, 1999).

The challenge with employee turnover is that often a symptom of other issues, but induction can reduce the degree of employee turnover and thus reduce costs. Creery (1986) argues that most of the costs of the turnover are likely to be hidden and therefore difficult to quantify. Hacker (2004) argues a more tangible and numerical perspective in that an appropriate induction process can increase retention levels by as much as 25%. A survey done by *Logistics and Transport Focus* (2003: 11) in the United Kingdom suggests that more staff leave in the first six months than any other time and therefore, *'one of the key messages for organisations was to get their induction right, to avoid having to repeat these costs unnecessarily'*. Schein (1964: 9) suggests that this problem is not a new, and that in the 1960s, 50% of all new graduates depart from the organisation within the first four or five years.

It is important to acknowledge that the cause of the reduction in employee turnover and improvement in retention may be linked with the *'Hawthorne Effect'* (Denova, 1968). The effect is to do with a situation where it is the interest in the well being of the individuals themselves improves their performance and output, rather than the content or the change itself (Denova, 1968). It is difficult to argue either case with concrete data. The issue become mute when considering it is not necessarily the content that must be considered, but the output as well. The output in this case is reduction in employee turnover and improvement in retention of new staff and that should be sufficient.

B.1.10. Reduces Communication Breakdowns & Mistakes

Many authors (Hacker, 2004, Robbins, 2002, Kuzmits, 1976, Kanouse & Warihay, 1980 & Creery, 1986) suggest that an induction process reduces mistakes due to communication breakdowns. However, Hacker does not detail her understanding of what she constitutes a communication breakdown. It is argued that this can include the appropriate communication parameters and methods, and the required language, terms and acronyms.

B.1.11. Developing Confidence and Empowerment, but Reducing Anxiety and Fear and Motivating new staff

Hacker (2004) suggests induction provides a degree of empowerment and confidence building with new member of staff. Induction allows the new employee to feel less anxious and more relieved with his or her decision and new position (Hacker, 2004, Mahoney, 1969, Lee & Reuschling, 1973, George & Miller, 1996, Hicks (Editor), 2000, Kanouse & Warihay, 1980, Mestre, Stainer & Stainer, 1997 & Robbins, 2002).

New members of staff arrive to the organisation with a new excitement and level of enthusiasm (Meighan 2000, Mahoney, 1969 & Shea, 1982). This is more evident in the team context in which the new member of staff will be working (Meighan 2000). In addition, the process does create a sense of *'belonging and pride'* (Lee & Reuschling, 1973: 17).

B.1.12. Meeting the Requirements National Qualifications Framework

The investment made into new employees and the development of these employees, provides a driver for the organisation as being an investor in people, from a legal standpoint (Meighan, 2000). In a South African context, such a process is known as the National Qualifications Framework and is part of the Skills Development Framework. This allows for the incorporation of the organisation's skills development into the national skills strategy that can benefit the organisation financially and in terms of their skills development plans.

B.1.13. Addressing Affirmative Action

Lee and Reuschling (1973) make direct reference to the benefit of an induction process in addressing affirmative action (also Kanouse & Warihay, 1980). The appropriate process is able to examine, explore and resolve training and development issues for fast-tracking where and when necessary. This is especially appropriate in the South African.

B.2. Objectives for Induction

The objectives for the induction process and the theoretical justification thereof, are detailed as follows:

B.2.1. Organisational Objectives

a) Improving Staff Retention

A key part of the induction process is the need to increase the retention of new staff (Healthcare Executive, 2003, HR Briefing (Aspen), 1999, Compensation & Benefits for Law Offices, 2001, HR Briefing (Aspen), 2001, Office Pro, 2000, Robbins, 2002, Shea, 1982, Chancey, 1968, Wanous, Stumpf & Bedrosian, 1979, Garvey, 2001, Managing Training & Development, 2002, Lee & Reuschling, 1973, George & Miller, 1996, Kennedy, 2001, Klienman, 2000, Jauch & Sekaran, 1978, Hicks (Editor), 2000 & Leadership for the Front Lines, 2001). This is an important objective as it has financial consequences for the organisation.

It is the first impression that most affects staff retention (Mel Klieman cited by HR Briefing (Aspen), 1999, Shutovich, 2003, Shea, 1982, Andersson, 2001, Kennedy, 2001 & Office Pro, 2000). Given the ease with which staff can change jobs and move companies, organisations can reduce the turnover of staff through the investment in induction. The challenge is that the causality between the investment (induction) and the impact (reduced staff turnover) is not always understood.

It is also important to acknowledge that this is not the only objective of the induction process. Shannon (cited by HR Briefing (Aspen), 2000: 2) is of the opinion that retention is an important part of induction and believes that the real objective is to *'welcome your new hires and help them become acclimated to your company's unique culture'.*

b) Creating a Learning Organisation

Kur and Pedler (1982) argue that the creation of a learning organisation and learning communities is a key objective for induction (also Jerving, 2003). Part of the creation of a learning organisation is the development of self-directed learning and self-management, and this is about the development of learning skills for members of staff (Kur & Pedler, 1982 & Goodberry-Dyck, 2003). Loraine (1997 & 1999) suggests that normal learning models indicate that learners only learn 10% of what they are taught. It is therefore, more powerful to create an organisation built on learning skills and learning communities. *'Ideally, ...learning should occur both within the parts of [the] business groups an across the different groups'* (Prokesch, 1997: 158). Kur and Pedler (1982: 90) provide the following model of the stages of a learning community in Figure 15: Stages of a Learning Community (Page 116):

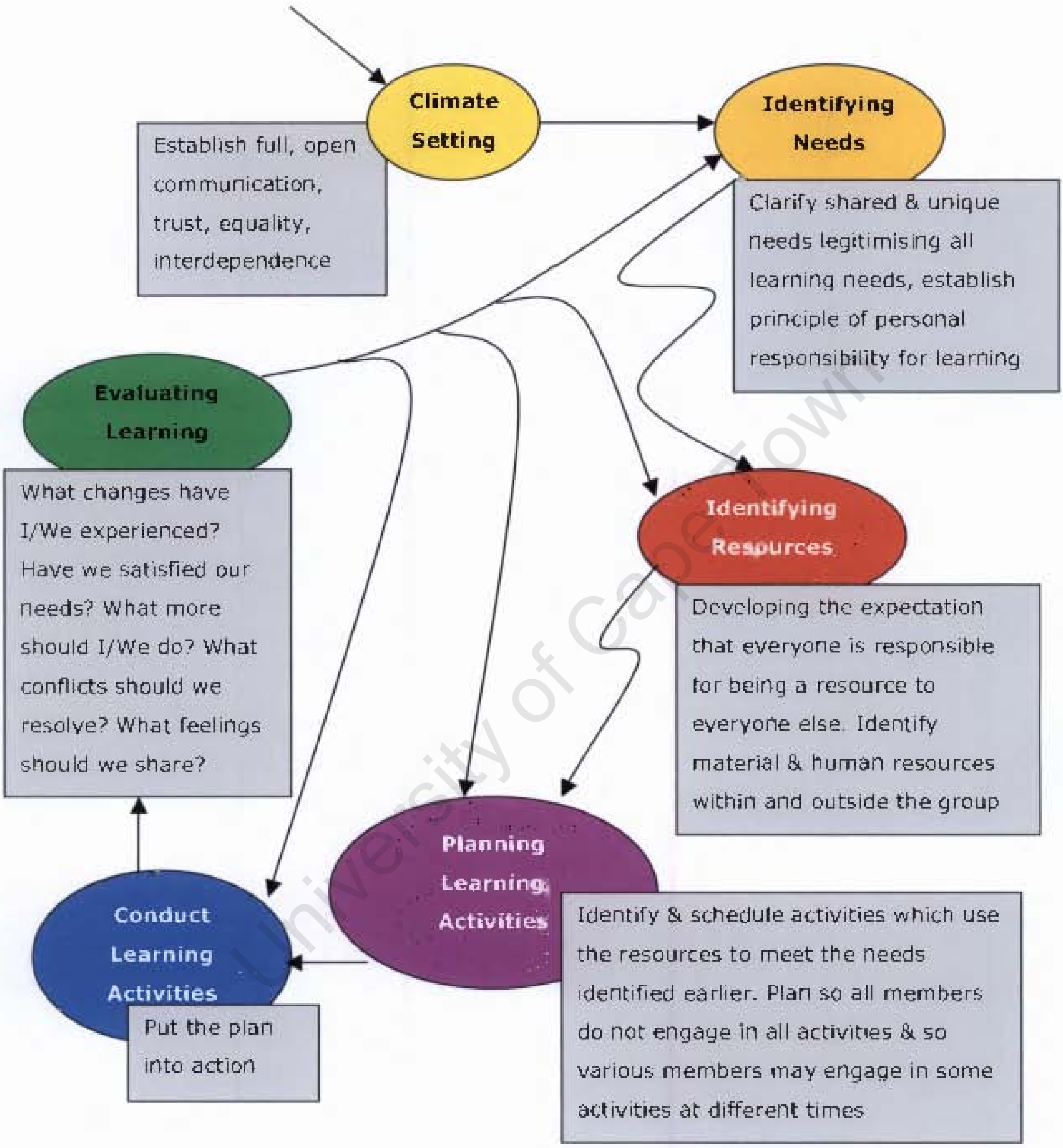


Figure 15: Stages of a Learning Community (Kur and Pedler, 1982: 90)

It is interesting that design for a learning community detailed above, is in line with the learning cycle. There is an opportunity for the organisation to develop a collective learning culture, especially with the arrival of new members of staff. The culture can permeate through the organisation. The challenge is that such a culture can challenge the current organisational culture that could cause a degree of conflict. However, this should not been seen as unexpected.

Messmer (2001: 20) highlights the perspective that *'staff members who are passionate about what they are learning typically transfer this enthusiasm to their jobs'*. Therefore, part of having a truly learning organisation is that enthusiasm is for learning and for the employee's new position within the organisation (HR Briefing (Aspen), 2001: 6). The creation of a learning culture allows for the organisation to cope with a changing environment, which is appropriately beneficial for a new member of staff in a foreign or new situation.

c) Challenging to the Status Quo

An unintended objective to the arrival of new members of staff is that new employees provide a different perspective on the manner in which the organisation operates. This can assist in further development of the organisation and the creation of a truly learning organisation (Andersson, 2001, Andersson, 2001, Shea, 1982, George & Miller, 1996 & Goetz & Zimmerer, 1975). Having not been steeped in the organisation for too long a period, new employees can provide insight. These perspectives should be appreciated and respected and used to further develop and grow the organisation. Lindo (1999) suggests that at the end of the employee's first week, he or she must provide suggestions for improvements and areas of inefficiency (also Goetz & Zimmerer, 1975).

B.2.2. Individual Objectives

a) Acclimatising to the New Environment

A new environment takes time to acclimatise to and it is important to improve this adjustment into the new setting (Human Resources Department Management Report, 2002, Wanous and Reichers, 2000, Strategic HR Review, 2002, HR Briefing (Aspen), 2000, Shea, 1982, Andersson, 2001, Loraine, 1997, Mestre, Stainer & Stainer, 1997 & Healthcare Executive, 2003). This also involves reassuring the new employee that he or she has made the *'right'* choice by joining the organisation (McConnell, 2003, HR Focus, 2001 & HR Briefing (Aspen), 2000). The assumption is often made that employee's are sold 100% to their new position and this is not necessarily the case and thus they need to be reassured that their decision is a good one (Leadership for the Front Lines, 2001).

It is also useful to *'play up'* the advantages of working for this organisation, both tangible and intangible (Leadership for the Front Lines, 2001). By doing so, it reinforces the reason for why the individual chose to come and work for the organisation.

b) Familiarisation with of the Organisational Culture, Values and Indoctrination of the Organisational Philosophy

This refers to the organisation and corporate culture, values and philosophy and how the new employee is expected to relate to the new organisation and their new colleagues (Human Resources Department Management Report, 2002, Leadership for the Front Lines, 2000, Healthcare Executive, 2003, Garvey, 2001, HR Briefing (Aspen), 2000, McConnell, 2003, Andersson, 2001, Shutovich, 2003, Shea, 1982, McConnell, 2003, Robbins, 2002, Rock, 1993, Lee & Reuschling, 1973, George & Miller, 1996, Jauch & Sekaran, 1978, Hicks (Editor), 2000, McGillicuddy, 1999 & Strategic HR Review, 2002). It is important as part of the induction process to spell out points about business goals and company dynamics (Supervision, 2001 & Compensation & Benefits for Law Offices, 2001). Human Resources Department Management Report goes so far as to describe an organisation that spends an entire day on culture understanding and development (2002). The principle is that the organisation's culture is a key dynamic to the future success of the individual.

Within a South African context, issues of cross-cultural dynamics and affirmative action come into play. These need to be addressed early in the employee's experience. Support infrastructure needs to be in place. Induction is a means to address feelings of anxiety and unease, especially for individuals entering an arena with little or no experience both in the area of expertise required and the cultural and community (Lee & Reuschling, 1973).

c) Clarifying Expectations

It is important to challenge the assumption that a new employee knows the expectations the organisation possess of him or her and he or she knows what they have been hired to do (George & Miller, 1996, Kuzmits, 1976, Hicks (Editor), 2000, Kanouse & Warihay, 1980, Day & Cohen, 1988 & Kennedy, 2001). Such an assumption is false and not all employees feel comfortable in asking for clarification (Supervision, 2001, HR Briefing (Aspen), 2001, Compensation & Benefits for Law Offices, 2001, Robbins, 2002, Lee & Reuschling, 1973, George & Miller, 1996, Mestre, Stainer & Stainer, 1997 & Andersson, 2001). It is important that the new member of staff have an understanding of what is expected in terms of performance (Leadership for the Front Lines, 2001 & Kanouse & Warihay, 1980). This is often as a simple as giving the employee a new job description and letting them ask questions (Healthcare Executive, November / December 2003, Leadership for the Front Lines, 2001).

d) Making Staff feel Valued and Important

This objective involves making new staff feel welcome, important, valued and creating a sense of belonging and pride about the organisation (Hacker, 2004, Mahoney, 1969, Robbins, 2002, HR Briefing (Aspen), 2001, HR Focus, 2001, Lee & Reuschling, 1973, Leadership for the Front Lines, 2000, Klienman, 2000, Hicks (Editor), 2000 & Office Pro, 2000). No member of staff, new or otherwise, wants to feel as if he or she is not seen as important to the organisation. Induction creates the perspective that the new employee *'counts'* (Lindo, 1999).

e) Improve Morale & Motivation

Induction allows for the development of a sense of belonging and inclusively into the strange new world of the organisation (Lee & Reuschling, 1973, Kennedy, 2001, Klienman, 2000, Hicks (Editor), 2000, Kanouse & Warihay, 1980 & George & Miller, 1996). This results in a positive sense about the organisation, creating motivation and morale improvements that have benefits for both the new employee and the organisation (HR Focus, 2001, Lee & Reuschling, 1973, George & Miller, 1996 & Robbins, 2002).

f) Understanding of the New Position and Role, including within a Team Context

It is an important objective to create understanding of the new position and how it relates to the rest of the organisation (Strategic HR Review, 2002, Healthcare Executive, 2003, HR Briefing (Aspen), 2001, Robbins, 2002 and Wanous & Reichers, 2000). This includes a sense of alignment to their team and the goals and objectives of the team and the new employee's role therein (Office Pro, 2000, Hacker, 2004, Leadership for the Front Lines, 2001 & Healthcare Executive, 2003). This also includes the roles of the various team participants and how this relates to the team function (Leadership for the Front Lines, 2001). A key part is giving new staff a sense of understanding of their new and unknown environment (Strategic HR Review, 2002 & Office Pro, May 2000). It gives comfort about the organisation and the unknown.

g) Ability to understanding the Bigger Picture

The bigger picture provides the new employee with a sense of the organisation as a whole (Hacker, 2004, Office Pro, 2000, Garvey, 2001, Robbins, 2002, Supervision, 2001, Klienman, 2000, Jauch & Sekaran, 1978 & Healthcare Executive, 2003). It gives them a sense of where their role is positioned within the greater organisation. It also creates a sense of commitment to the organisation and this *'bigger picture'* (Lee & Reuschling, 1973: 17).

h) Gaining Organisational Information

This component involves providing the new employee with information and the skill to find information when needed (Office Pro, 2000 & McConnell, 2003). Compensation and Benefits for Law Offices article emphasises that most induction focus on information that is not important or relevant and forget about the issues that are seen to really matter (2001, also discussed by Day & Cohen, 1988 & Ezzell, 1979). The focus should be in providing the information that is both most relevant and most important (Leadership for the Front Lines, 2000, Day & Cohen, 1988 & Ezzell, 1979).

The information that is really important is debatable, but includes the building of knowledge with respect to legal issues and the employment relationship (Office Pro, May 2000 & Leadership for the Front Lines, 2001). This information can go into the level of detail in areas such as antidiscrimination, anti-harassment, grievance, disciplinary policies (HR Briefing (Aspen), 2000) as well as the structure and history of the organisation (Leadership for the Front Lines, 2001). Day and Cohen (1988) argue that it is the line manager or supervisor's role to determine what information needs to be imparted to the newcomer. However, this is in contrast to using an induction programme to pass on the information. This can be argued to be additional responsibility on the line manager and potentially additional work. It is argued that information overload is not helpful to the new employee and this needs to be taken into account (Davies, 2001, Cox & Sweeney, 2001 & Hacker, 2004). An article in Managing Training & Development argues that less is more in the arena of information transfer to new members of staff (2002, supported by Ezzell, 1979). It is also important to recognise that the employee may have a degree of knowledge regarding the organisation and time should not be wasted on this area (Cox & Sweeney, 2001). However, this is dependant on confirmation of the accuracy of the information.

Andersson (2001) suggests that the focus is giving the new member of staff information that will assist them in getting the work done (Ezzell, 1979). It is often assumed that the employee will read and digest all information, especially when they are required to sign acknowledgement of this (HR Briefing (Aspen), 2001). This, however, is not necessarily the case and this must be addressed during induction. It is not sufficient to merely hand the individual the *'manual'* and then expect learning to happen. The learning needs to be facilitated (Chancey, 1968).

i) Developing Working Skills

This objective involves the development of skills and knowledge for the new members of staff and their new position (Strategic HR Review, 2002, HR Briefing (Aspen), 2001, Robbins, 2002, HR Focus, 2001, Lee & Reuschling, 1973 & Goodberry-Dyck, 2003). Such a development process may even include some technical skills, such as computer software packages (HR Briefing (Aspen), 2000). Providing the new employees with a sense that they will be trained and developed reduces the sense of unease and fear about not being able to fully meet the requirements of their new position (Office Pro, 2000 & Goodberry-Dyck, 2003).

j) Ability to Handle the Stress of a New Position

A key role of the induction process is reducing the amount of stress and anxiety of the new employee in their new position (Wanous & Reichers, 2000, Leadership for the Front Lines, 2000, Loraine, 1997 & HR Focus, 2001). Wanous and Reichers (2000) suggest two approaches to address issues of stress, one being problem driven and the either emotion focused. The problem driven approach is to allow the employee to identify the core area of the stress and work at resolving it, in partnership with his or her manager. The emotion approach addresses the emotive component of the stress causality (Wanous & Reichers, 2000). The new employee should be allowed some time to get to grips with the new position before to many demands are placed on him or her in their position (Leadership for the Front Lines, 2000).

k) Modelling the Desired Behaviour

It is the behaviour of the other individuals in the organisation especially that of the managers, that will be modelled and emulated by the employees, especially the new ones (Wanous & Reichers, 2000, Lee & Reuschling, 1973 & Goodberry-Dyck, 2003). Therefore, the behaviour that is exhibited should be discussed and understood, especially with the interactions with customers and clients (Goodberry-Dyck, 2003 & Lee & Reuschling, 1973). Often the behaviour will be in contrast to the employee's current experience and this can be unsettling. Therefore, the discussion is important to address the concerns and let learning happen. *'Learning that challenges current beliefs and mindsets to develop new understanding and ways of behaving'* (Strategic HR Review, 2002: 5).

l) Getting a Picture of Future Opportunities

Give the new employees a sense of their potential future direction (Schein, 1964). This may be difficult given the nature of the modern organisation, but Schein's point can be seen in the context that employee wants to know of future opportunities open to him or her. Although, these perspectives need to be realistic, otherwise this will create disappointment and resentment should these expectations not be met. Part of this process of clarifying future opportunities is the discussion regarding a career path. This provides the new employee with a sense of direction and future prospects (Leadership for the Front Lines, 2001).

m) Building Relationships, Networking & Engaging in Teamwork

Joining a new organisation means the need to start and develop new relationships and develop an internal network. Induction can help nurture their network and building relationships within the organisation and thus making the acclimatisation of the new employee easier and better (Supervision, 2001 & Office Pro, 2000). The nature of the employment relationship is that it does not take place in a vacuum, and therefore it is important to have the discussion about the individuals with whom the new employee will interact (Supervision, 2001 & Compensation & Benefits for Law Offices, 2001). Jerving (2003) argues for the development of teams and teamwork through induction, which takes the relationship and networking development process further.

n) Holding Regular Assimilation and Process Review Meetings

It is argued that the honeymoon period last about six months. Therefore, Supervision suggests monthly meetings to discuss performance and receive feedback regarding the organisation and induction (2001, Mahoney, 1969, George & Miller, 1996 & Compensation & Benefits for Law Offices, 2001). This allows for both the manager and the employee to focus on ensuring the success of the process of transition into the organisation (Supervision, 2001).

o) Addressing Technical Issues

The technical issues include things like desks, computers, telephone, email addresses and passwords (Compensation & Benefits for Law Offices, 2001, Garvey, 2001 & Connor, 2002). This may also include technical training on areas the new member of staff would have had no experience in (Lee & Reuschling, 1973), such as organisation specific computer programmes or processes.

p) Using Coaching Resources

The suggestion is that the organisation makes coaching resources available to the new employee before there is a crisis (Supervision, 2001, Kennedy, 2001 & Benefits for Law Offices, 2001, Mahoney, 1969 & Compensation & Benefits for Law Offices, 2001).

Coaching through the transition period is a useful tool to addressing issues prior to them becoming bigger as time goes on. The line manager or a third party can complete this role, which is useful in allowing for another perspective on an issue. It is important that the coach has such a capability.

q) Increased Productivity

A key objective of induction is to get new members of staff to become effective and efficient in their new position within the shortest period of time (Strategic HR Review, 2002, Managing Training & Development, 2002, Hicks (Editor), 2000, Mestre, Stainer & Stainer, 1997 & Office Pro, 2000), thus enabling the new member of staff to quickly become productive (Healthcare Executive, 2003 & Robbins, 2002) and getting a faster return on the investment that the organisation puts into the individual.

r) Developing understanding of Health, Safety, Security and the Environment (HSSE)

A legislative requirement in many countries in the world is training in Health, Safety, Security and the Environment (HSSE) (Kaletsky, 2003). Any working environment carries risk; the nature of the risk is dependant on the nature of the environment. It is therefore advocated that new employees learn about the HSSE requirements for their organisation (Shea, 1982). It can be argued that the learning should also include the legislation, however, this maybe too onerous.

Kaletsky (2003: 37) suggests that *'the orientation program should include a well-structured session dealing with fundamentals of safety and health on the job'* and further that *'from the first day forward, employees should be convinced to have positive expectations about safety training'* (2003: 37). The focus of the process should be the wellbeing of the employee. The training can not be a substitute for the vigilance and awareness of the employee and that the employees *'understand the purpose and objective of the training'* (Kaletsky, 2003: 37) and that people get hurt, injured or even killed if operations are not performed in the correct manner. Kaletsky suggests an assessment process to ensure understanding, however this takes the responsibility away from the employee. Therefore, it must be shared with the employee to ask any questions should he or she have any. These questions include the mistakes both on the part of the employee, but also the organisation.

s) Revealing and Honest about Potential Pitfalls and Past Mistakes

It is important as an organisation to acknowledge both the successes and failures. This allows the new member of staff the opportunity to not repeat the same mistakes, but also to help prevent the organisation from committing the same mistakes (Supervision, 2001 & Compensation & Benefits for Law Offices, 2001). This is in line with creating a truly learning organisation.

B.2.3. Induction Activities

Wanous and Reichers (2000) argue most orientation programmes are too narrow in their focus. They detail that most organisations detail the orientation programme to impart information to the new inductees (Wanous & Reichers, 2000 & Shea, 1982). Wanous and Reichers (2000) suggest that inductees require more information pertaining to their job, as opposed to the organisation and this assists in their adjustments. However, in addition, they advocate the building of relationships and the management of the stress of the position. Reichers and Wanous (1994) in an earlier article suggest that each newcomer should have a new orientation programme, designed for him or her specifically, however, this is not necessarily realistic. This is especially given the nature of large organisations, costs, both from a time and financial perspective may be too high in comparison with the relevant reward.

Andersson (2001) suggests the use of a road map for the induction process. Such a road map allows for the newcomer to plan their own induction, but also to understand where the process is heading (Andersson, 2001).

The nature of the induction process is that it assumes a lack of knowledge and skill by all participants. This approach is not always effective as it does not allow for any form of recognition for prior knowledge and learning. The use of a modular approach allows for the new employee to skip ahead if necessary (Shutovich, 2003 & Shea, 1982).

Wanous and Reichers (2000) provide a model of induction that separates orientation and socialisation. The authors outlined their similarity as being concerned with the post-entry phase and that they are concerned with the 'organisational fit' of the employee and the new organisation. Wanous and Reichers (2000) do outline the differences between orientation and socialisation, they have highlighted a number of differences. These differences can be summarised to state that orientation is a once off event, in their mind; whereas socialisation is seen as an ongoing process. Given the discussion and focus during this process, it is argued that the definition of 'socialisation' matches that of the induction process described and outlined previously in this research project.

Wanous and Reichers (2000) discuss the psychological contracting between the employee and the organisation. Wanous and Reichers cite Rousseau (1995: 9 cited by

2000: 437) when they define a psychological contract as *'beliefs that individuals hold regarding promises made, accepted and relied on between themselves and another (employer, client, manager, organisation)'.* The induction process aims to manage this contract as the new employee's expectations are addressed through the process.

The various components of the induction process allow for the examination of induction at various different levels. These different levels are examined by Gerber, Nel and Van Dyk (1987); the first of which being an organisational induction. Gerber et al. (1987) talk of addressing subjects of general interest with new employees. The description of 'general interest' is open to interpretation and challenge, as the general interest needs to be for all parties involved. The authors (1987) refer to the second part of the induction process as departmental and task induction. They state that this part of the induction involves a discussion regarding a new employee's particular task and the section or area he will be working.

Hacker (2004) provides an alternative breakdown of the induction process, suggesting three stages: the pre-hire stage, immediately post-hire stage and the final stage which takes place beyond the first week and throughout the first year. The nature of the documented approaches regarding induction is the level of common ground and the degree of overlap between the various approaches.

Hacker (2004) goes into detail with regard to each of the stages, however, Andersson (2001) argues that induction needs to begin prior to the new employee's first day, otherwise it may be too late. This statement may be melodramatic, but it does emphasis the need to prepare for the new employee's arrival. Hacker (2004) starts with the pre-hire stage, Andersson (2001) goes further to suggest that work must be undertaken prior to the recruitment process having been commenced and the process itself, however, this is beyond the scope of this research process.

With respect to the pre-hire stage, Hacker (2004) goes into detail starting with the pre-hire stage:

- Send a welcome card to the new employee's house, with a personalised brief message from all the team members (Hacker, 2004, also highlighted by Lindo, 1999, Robbins, 2002 & Goodberry-Dyck, 2003). Lindo (1999) goes further and suggests a follow-up telephone call for clarification and start the relationship building process. This may go so far as to a phone call to the night prior to the commencement of the employment relationship (Lindo, 1999).
- Pass around details regarding the new member of staff, including a picture (Hacker, 2004 & Lindo, 1999). Lindo (1999) suggests given the new employee a 'crib' sheet of

all the employees, assisting him or her on their first day or work. It is even argued to give the supervisors gives the newcomer a list of their 'pet peeves' and what the other employee's are like (Leadership for the Front Lines, 2000).

- Lee and Reuschling (1973) go so far as to suggest passing around a photo of the new member of staff to customers if the newcomer is involved in customer relationships building, if a personal introduction is not possible.
- Hacker (2004) argues that there should be an assessment of the new employee training requirements and schedule the necessary training prior to their commencing work. This perspective is debatable, as there alternative approaches and assessment of the new employee's competency is not always appropriate unless on the job. Hacker (2004) argues that this shows effectiveness and efficiency. It also suggests the organisation is passionate about being a learning organisation (Hacker, 2004, McConnell, 2003 & Goodberry-Dyck, 2003).
- Documentation of the requirements for what is expected by the new employee during their first three months on the job, discuss these expectations with the employee during their first week (Shea, 1982, Hacker, 2004, Garvey, 2001 & Goodberry-Dyck, 2003). Einstein (Hacker, 2004: 90) states that *'to the degree that people know what's expected, to the same degree they can succeed'*.
- Define the limits of authority and the degree of flexibility in the position. The degree of flexibility refers to working context, and whether or not the individual has flexibility in hours and working from home etc, especially in the first three months. The limit of authority refers to the type of decisions that can be made without authority. This must be documented and detailed, including everything important and must be discussed with the new member of staff on their first day of work (Hacker, 2004).
- Many authors suggest providing the employee with a so called employee pack, which includes the employee handbook, the relevant job description, performance evaluation forms, information regarding the history of the business and various payroll and benefit forms and even go so far as an allocated parking space and provide a map of the building (Hacker, 2004, Garvey, June 2001, Robbins, 2002, Lindo, 1999, Shea, 1982, HR Briefing (Aspen), 2001, McConnell, 2003, Merit, 1999 & Leadership for the Front Lines, 2001). However, this perspective is a debatable point. Such information is not necessarily helpful as it often does not provide a context or is generally not appropriate or is too detailed (Ezzell, 1979). Some authors suggest a level of detail such as dress code or the company's history (HR Briefing (Aspen), 2001). It is the author's opinion that the new employee should access such information when they require (Ezzell, 1979). It is argued that often this information is not even looked at let alone understood (Leadership for the Front Lines, 2001 & HR Briefing (Aspen), 2001), it is therefore argued that this approach does not encourage learning.

The second part of Hacker's (2004) viewpoint is the discussion regarding the immediate post-hiring stage, with the objective of getting new employees comfortable and orientated to the company and the department:

- The new employee should be greeted in person (Merit, 1999). The individuals involved in the greeting process include both the direct supervisor and the employee's departmental manager. An alterative should be in place should that be required (Hacker, 2004, Garvey, 2001, Robbins, 2002, Leadership for the Front Lines, 2001, Shea, 1982 & Goodberry-Dyck, 2003). Penzer suggests that unless the organisation is relatively small, the newcomer feels overwhelmed on his or her first day and therefore, the initial experience needs to be positive and interesting (1973). Lindo (1999) goes so far as to suggest a breakfast to meet with the new staff member, the informality creates a relaxed atmosphere and reduces the tension for the new member of staff. This introduction should also be with as many of the new members of staff as possible, without overwhelming the new person (Compensation & Benefits for Law Offices, 2001 & Kanouse & Warihay, 1980). It can be suggested that the introductions take place slowly overtime to reduce the shear volume of new individuals the new employee will meet (Leadership for the Front Lines, 2000).
- A meeting needs to be scheduled between the new employee and the direct supervisor to discuss departmental operations and goals (Leadership for the Front Lines, 2001, Merit, 1999 & Penzer, 1973). This should be completed as soon as possible. Included in this discussion is information regarding accountability structures and goals and operating practices, such as telephone, cellular usage and internet usage, etc. (Hacker, 2004 & Lindo, 1999). This discussion may take place at the same time as the one listed above, but this may not be appropriate as the different supervisors and managers may take the meetings, depending on the organisational function. Garvey (2001) suggests that new employees detail what frustrates them the most at work and what would cause them to look for another position or job. This provides a picture of what drives the individual employee.
- Lindo (1999) suggests the opportunity to discuss the 'mission' and 'charter' of the organisation. However, in some respects, this should have been covered in interview process; but it is debatable. This includes culture, values and beliefs of the organisation (Lindo, 1999 & McConnell, 2003).
- Authors talk about the various operational issues, such as computers, passwords, email addresses, access cards etc, which need to be in place on or before employee's first day (Shea, 1982 & Connor, 2002, Garvey, 2001 & Benefits for Law Offices, 2001).
- Let the employee complete all the relevant documentation, specifically benefits and compensation programmes (Hacker, 2004, Garvey, 2001 & Robbins, 2002). Although

it is suggested that such documentation be completed prior to the employee's first day (Garvey, 2001).

- Hacker (2004) suggests that departmental specifics should also be covered, namely structure. However, in this context, the focus is the IT department. This may not apply in other areas, as it is not possible to provide the same degree of structure. The authors also suggest detail regarding roles and responsibilities of the various individuals in the department, reporting standards, management structures and working patterns (Hacker, 2004 & Merit, 1999). There is a question as to whether this level of detail is appropriate (Leadership for the Front Lines, 2001 & Shea, 1982).
- It is suggested that new members of staff be involved in team meetings as soon as possible (Hacker, 2004). This enables them to get into the 'swing of things' quickly and get involved. It also assists with the networking and relationship building process.
- It is seen as beneficial to give the new member of staff his or her job description as quickly as possible. This helps in answering any questions or tackling any concerns or problems early, and ensures the new employee understands what is practically expected from him or her (Leadership for the Front Lines, 2001, Robbins, 2002, Merit, 1999 & Goodberry-Dyck, 2003). The detail includes how the individual's job relates to either parts of the organisation and the performance standards and expectations regarding the position (Leadership for the Front Lines, 2001). Generally, new employees are concerned or embarrassed to admit a lack of understanding about an aspect of the new job (Hacker, 2004), detailing the requirements addresses this potential lack of understanding.
- Hacker (2004) offers the novel view of making the beginning of the new job a celebration. This involves creating a celebrative atmosphere and ensuring the new member of staff is productive as soon as possible. A part of the celebration is a lunch for a collective celebration of the new employee, within the first week, possibly on the first day (Hacker, 2004, Lindo, 1999, HR Focus, 2001: & Goodberry-Dyck, 2003).
- Some authors suggest creating the opportunity for a 'quick win' for the new employee to build self-confidence as well as team confidence in the new member of staff (Shea, 1982, Cox & Sweeney, 2001 & Mahoney, 1969). This is seen as artificial. Therefore, is not suggested as it condescending and does not allow for the employee to manage themselves.
- Give the new member of staff a tour of the office (Merit, 1999). This may prove to be useful or overwhelming and should be done at the discretion of the individual's manager.

The third and final phase of the induction process takes place beyond the employee's first week and within his or her first year. These do not necessarily take place immediately and some are an ongoing process and not a single event (Hacker, 2004 & Jerving, 2003):

- Introduce or reintroduce the new member of staff to all the relevant employees. This allows for the new employee a chance to meet everyone, even if they are absent at some point in the initial induction phases (Hacker, 2004, McConnell, 2003 & Robbins, 2002). It is possible to have introduction games, such as signature, passport or photo gathering, which requires getting some record of meeting the person (Hacker, 2004). Bearing in mind that some organisations are too large to have such an exercise. Instead, this maybe limited to a floor or department.
- It is important to ensure that a new recruit is briefed on all appropriate office equipment, as well as providing a place or individual to answer any questions or address any concerns regarding the equipment (Hacker, 2004 & Robbins, 2002).
- Share the documented job requirements that are prepared for the employee prior to their hire. By having the requirements written and sharing them in a discussion, both parties are aware of the practice expectations (Hacker, 2004 & Robbins, 2002).
- Hacker (2004) suggests the establishment of specific project or job goals, which provide a more tangible measure of organising and understanding what success will look like (Leadership for the Front Lines, 2001, Shea, 1982, Kuzmits, 1976 & Robbins, 2002). The suggestion is for a period of approximately 90 days, this is considered more manageable (Hacker, 2004).
- Authors recommend the buddy or mentor system. This suggestion is that new members of staff are paired with those who have been there for a while. It is not necessary that it is departmentally specific, but it is very useful to create organisation knowledge sharing and creating dynamic and productive relationships (Hacker, 2004, Robbins, 2002, McConnell, 2003, Mahoney, 1969 & Davies, 2001).
- A further discussion regarding the new employees training requirements is important. This detail builds on work initially undertaken prior to the new employees starting. This process examines their areas of development that would make them more productive and efficient in their new position, focussing specifically on the gaps (Hacker, 2004, McConnell, 2003, Leadership for the Front Lines, 2001 & Strategic HR Review, 2002).

The above approach should not seen as all-inclusive or having all parts required by the organisation. Rather, this is seen as a model from which the organisation can draw on where appropriate (Hacker, 2004). In the case of the Company, some of the approach proved to be too complex to implement given the nature of the organisation. However, Shea (1982) argues for a team developed induction process. In other words, the team sit down and develop the induction alternatives for the new individual.

Hacker (2004) raises some points of discussion regarding the environment in which the new employee begins. The new employee enters an historical environment, in which events have taken place that do not and have not involved them. This includes issues such as other members of staff having applied for the very position the person now holds, the previous employee could have been a star or a poor performer. Each event has a different impact, both potential and actual on the new employee, but especially the induction process (Hacker, 2004).

It has been argued that additional information on the legal nature of the employment relationship and the laws that govern this relationship need to be addressed (Leadership for the Front Lines, 2001 & Office Pro, 2000). This provides the person with an understanding of their legal standpoint in terms of rights as well as recourse, which is beneficial in terms of South African legislation.

It is also appropriate to consider the area of HSSE (Shea, 1982). Organisations have an obligation, sometimes dictated by law, to ensure that their staff are aware of the HSSE requirements in their new environment. As a result, it is important to ensure that staff are appropriately aware and compliant with the internal requirements as well as all legislative obligations.

France and Jarvis (1996) suggest a workshop style learning opportunity for newcomers to develop an understanding in a collectively learning experience. Such a workshop takes place within phase two and three of the induction process. As a collective learning experience, it provides the opportunity to create learning. Much of the focus of this action research process has been around the development and implementation of this part of the induction learning. The challenge is the content that falls within this workshop. Each organisation has different needs and requirements for an induction workshop, the challenge is ensuring the infrastructure and process is in place to provide the appropriate entry and exit in the new job for the newcomer to the organisation.

B.2.4. Roles in the Induction Process

The following roles are evident in induction theory:

a) HR / Learning

This particular group is defined as either the Human Resources Department (HR) or The Learning Department. Some organisations separate their Learning and Administrative functions, as in the case of the Company in question. Gerber et al. (1987) suggest that the responsibility for induction should be shared between the HR department and the

Line Manager. Responsibility should not lie completely with HR (Kanouse & Warihay, 1980). Gerber et al. (1987) goes further to state that the responsibility for the HR department is for the following:

- Initiate and coordinating induction
- Training the line managers to manage and oversee their part of the induction process
- Oversee the general or organisational induction process
- Follow up of the induction process

It is the responsibility of the HR department to oversee the general induction of the new employee to the organisation (Leadership for the Front Lines, 2001, Hicks (Editor), 2000 & Reichers & Wanous, 1994). This departmental role is supported through the coordinator role. The challenge is that HR focuses on coordination, but the new employees *'are primarily interested in what the supervisor says and does because they will be interacting with this individual on a daily basis'* (Robbins, 2002: 8). Therefore the focus of the induction process should be the Line Manager.

b) Induction Coordinator

There is specific role for an individual in the organisation to coordinate and manage the induction process. This individual's role is to *'bring new ... members up to speed'* (Shutovich, April 2003: 10).

c) The Learning Facilitator

Goodberry-Dyck (2003) makes the statement that the individual chosen to facilitate the learning of the new employees in the learning process, should be chosen wisely. The role is important, as the individual needs to be well versed in the organisation and the required skills that need to be developed. The additional challenge is the need for facilitation skills to oversee the learning process.

d) The New Employee

The new employee has a role and responsibility in their own induction process. The key responsibility of the learner is to *'take responsibility for the success and the duration of the induction process'* (Reichers & Wanous, 1994: 23).

e) The Line Manager / Supervisor

The induction process is key in getting the new employee through the transition period and a primary role in this process is the individual employee's superior or line manager (Supervision, 2001, Leadership for the Front Lines, 2001, Hacker, 2004, Reichers & Wanous, 1994, Shea, 1982, Lee & Reuschling, 1973, George & Miller, 1996, Hicks

(Editor), 2000, Kanouse & Warihay, 1980, Day & Cohen, 1988, Human Awareness Publication, 1996 & Robbins, 2002). A well-integrated orientated programme is determined through the relationship and cooperation between staff and line management (Robbins, 2002). The individual supervisor can be trained and developed to oversee and manage the individual employee through their induction experience (Shea, 1982, Day & Cohen, 1988 & Lee & Reuschling, 1973). It may not be part of the supervisor or line manager's job description, it is part of their role as it can be seen as a supervisory function (Day & Cohen, 1988).

f) The Buddy

The 'Buddy' (sometimes called a 'sponsor') is the role of an individual in the new employee's team, a peer or co-worker who is there to provide an information, support and socialisation role (Hacker, 2004, Davies, 2001, Mahoney, 1969, Merit, 1999, Leadership for the Front Lines, 2000, Hicks (Editor), 2000, Meinecke, 2000 & Robbins, 2002). Some organisations have suggested the use of personal tutors, which takes the concept of a 'buddy' to another level, however, this may not be necessary with the appropriate skill development for the new employee, they are able to take responsibility and management of their own learning (Managing Training & Development, 2002).

g) The Mentor

In contrast to the concept of the buddy, Strategic HR Review (2002: 5) offers the perspective of mentors and that *'mentors can determine the success of an induction process'* (supported by Kennedy, 2001). The role of the mentor is an important part of the induction process (Strategic HR Review, 2002, Hacker, 2004, McConnell, 2003, Davies, 2001, Meighan, 2000, Meinecke, 2000, Loraine, 1999 & Lindo, 1999). This is because they can act as a guide throughout the process. In addition, Messmer (2001: 20-21) makes the assertion that *'Mentoring...are a particularly effective way to help employees grow professionally'*, which is useful in the developing and encouraging new staff.

Mentoring guidance can include insight and understanding into *'the way things work around here'*, moral support and access to informal relational networks (Strategic HR Review, 2002: 5). An important part of the process is that the informal information found within the organisation can be distributed to the new members of staff. Such information is generally only learned through experience and this dissemination accelerates the rate at which the new employee becomes fully competent in the organisation (Strategic HR Review, 2002).

Atkinson (2002) offers the perspective that mentoring offers the opportunity for one-on-one interaction, although he goes so far as to suggest the use of technology to facilitate mentoring, and not only physical one-on-one interactions, and using the mentoring relationships in performance management. This relationship assists in the new employee meeting their required performance (Atkinson, 2002).

From a Constructivist perspective, Hay and Barab (2001) suggest that there are options for the role of the mentor (or as they describe the 'old-timer') in creating the learning environment. This includes following:

- The facilitator of the learning process becoming more like the mentor.
- The facilitator can bring the capability of the mentoring into the learning process.
- The facilitator can continue to use the resources of the community within a direct link into the community.

These approaches can assist in the learning process, but must be assessed against the organisational requirements (Hay & Barab, 2001). They do provide options as to how to most effectively create or use mentors in learning without creating an unreasonable burden on the mentors or the organisation.

h) The Organisation

The organisation plays collective role to ensure the induction of the individual employee. The organisation assists the new employee in order that they may become a productive member as soon as possible. It is not realistic, nor practical to determine the exact nature of this role, instead the focus is on the requirement thereof. The organisation's role is implemented through the leadership of the organisation.

i) Other Learners in Induction

Other learners in the induction process also provide a function to facilitate the learning. The other learners assist in the learning process as learning is a social activity and this is encouraged through the nature of the induction process.

j) Other Employees

Other members of staff provide assistance, often in an informal setup, to new staff. This assistance should not be ignored, but rather used to facilitate the learning of the new employees (Shutovich, 2003, McConnell, 2003, Lee & Reuschling, 1973 & Leadership for the Front Lines, 2001). Employees can be used in the formal induction learning process, but this depends on their skills as learning facilitators. With the appropriate assistance from the Line Managers, the other team members can be used to facilitate the learning of the newcomer (Lee & Reuschling, 1973).

Appendix C: Source Data

This source data is a representative sample of the data gathered and used in this research and provides a picture of the research audit trail. Due to the confidentiality required in this research project, any references to the organisation's name have been blacked out or replaced with '****'.

C.1. List of Interview Questions

****** Induction Questions**

General

What do you think is the **purpose** of the induction process?

Why do you **think** induction is **important**?

What is the **most important** thing that you think should be **in** the induction program?

What do you **have** / **need** to know on your first **day** on in this job?

Week

Month

Year

What **should** you know on your first **day** on in this job?

Week

Month

Year

In other **organisations** you have worked in, what were some of the things that were **covered** in the Induction program that **could** be included in **** Induction?

How would you **recognise** a **well inducted person**?

What are the **roles** / **responsibilities** for inducting of new employees?

Having Done Program:

*What did you **enjoy** / **like** / **learn** in the program?*

*What do you feel was **missing**?*

*What **should** be **repeated**?*

Managers

*What are the **most important** things that you feel that people need to **be aware of / understand** after having completed the induction?*

***How** does **current** induction processes (run by HR or non-HR) meet these **purposes**?*

Those who have never been inducted:

*How could you have been **better prepared** for your job?*

***How** do you think an induction program could have made a **difference** for a new employee?*

*What are some of the **lessons** you have **learned** in the organisation that should be **included** / **highlighted** / **shared** in the Induction (e.g.: **tips** etc)?*

Senior People who have never been inducted

*Do you think that people in **senior management** should have the **same** induction **program** as those in the rest of the organisation?*

C.2. List of Initial Individuals Interviewed

****** Interviews:**

	Email Agreement	Date	Confirmation Email	Finalised	Workshop
Brian.****@****.co.za	Y	16/05 @ 10am	Y	**Completed**	Y
Andre.A.****@****.co.za	Y	23/05 @ 10am	Y	**Completed**	Y
Erika.E.R****@****.co.za	Y	26/5 @ 12h00	Y	**Completed**	Maybe
Stephanie.S.***@****.co.za	Y	20/05 @ 11h30	Y	**Completed**	Maybe
Yusrah.Y****@****.co.za	Y	15/05 @ 14h30	Y	**Completed**	Y
Thanushia.Archary@****.co.za	Y	29/05 @ 9am	Y	**Completed**	Y

C.3. Sample of Interview Data

Name	Purpose for Induction	Role Players	Issues	Things to know	Process	Things that would help	Current Approach	Well-inducted Person	Current Induction	Future Changes
Yushrah ****	Intro into company	HR and Line	Contractors	Salary: Who to speak to	Self-Discovery: Need to find people willing to see people	Organigram of department	Thrown in the deep end	Not anxiety ridden	Out of the office: Retail (would be nice for more than one) and Depot	Yes, would make things easier
	Company values, what it stands for, core business		Need to have different induciton levels (Job Group 4 & Up: Strategy	Line Managers don't take responsibility	Weekly Meeting with line or team representive	Who to go to for questions		Confident in their department (Floor)		
	Role as employee		Induction when moving departments	****'s core values: How we do business	Need to understand parts & latermake links	Services: What do they offer		Be able to ask questions (know where to ask)		

	Take Anxiety away			****'s Business Principles	If know, don't go	Coach / Guide through the first couple of months		Given tasks as somewhere to start		
				****'s ethic above your ethic	Mentor / Coach role	Need direction throught the 1st year				
				Understand process of ****: Crude -> Refinery -> Deport -> Retail Site, Lubs Plant -> Retail (not that NB)	Talk with someone who has been here before as collective induction (Doesn't have to be HR - could be training for others)	U'stand SA in organisation (not that NB)				
				Social and sports side of things & Employee Care	Mentoring Program	Explain total cost of employment				
						Explain new deal				

Brian *****	Orientating people Taste in what they are in for Put people @ ease Bigger picture	Snr Management Reporting Line	Expats -> International Transfers Tailor made to suite direction heading off into Different for Snr Managers	Accronyms Depends on where you end up Customer focus (internal and external customers) Politicas - warning Corporate etiquette (especially young graduates) ****'s core values Conflict of interest issues				Customer-focused Aware of profitability		Big changes in the future: Global Lubs Initiative Project New Wave Africa

				****: Faster income statement (Business Driver) Organisational strucutres - Roles of each department Product side: Fuels / Lubs / Aviation						
Stephanie ****	Understand framework in which you work	Line Manage is the employee's first port of call	Company Induction should occur after someone has settled in a bit	Departmental Scorecard	The detail can be broken down into bite size chunks	Structure: Global - how it works		Basic understanding of the business in: Retail department / Operations / Property / Financial		Changes, yes: South Products Africa: Magnitude of change, time of strain, stretched organistion.

	Gives comfot level in which you operate	Colleges provide a natural resevoir of information	The lower down in the organisation, the less detail one requires	Managing own performance		Governance - Business principles (This may only apply Grade levels 4 and above)		Know who to call if they have an issue		Global Lbs: Business under change & (+) and (-)
	Understand the people you need to make contact with	HR Business Consultant acts as a gate keeper	Senior Managers Induciton: Would require more detail, more informal the higher up management, Informal network is very important. Formal may inhibit informal	Senior Managers neeed to know: Internal Audit Procedures, Group Crises Plan - this can all be done on a one-on-one basis in an informal process		Challenge is good, but need to provide limits - the organisation is a hierachical system. Need to challenge in the context of the system				

	Your requirements in terms of department -> how that ties into the overall objective	Effort needs to be made by the department and immediate collegues - eg. Taking someone out to lunch or coffee	Job Grade 2 + - knowning people and who to talk to is key, difficulty is resources and commitment. Expats: Local issues -> SA from a business perspective	Strategic Processes, issues planning, risk matric, SSA, Countries, Business Processes		Levels, department, values HSE scorecard People working in the organization Regulatory framework (specific work context)				

						Buddy system could work - provided it's not the employee's line manager, could be a mentor HSE How should you engage people...poli te manner				
Andre ****	Purpose is also about at what level?, when did the person join ****?, are they experiance d?	Line Managers need to participate -> there is a learning curve for employees	Departmental Induction is broad - retail is not just one area	Most NB: Business Principles (in the last 3-5 years it was brought to the forefront)		Wednesday guest speaker @ lunch time in the gallery	Graduate into retail is given full house of informatio n	Answer relevant questions		Change s are outside the web

	To provide with a total overview (level varies) of: ****, it's History. What it is all about, What makes up **** (Refinery, etc) Becoming comfortable with the organisation	Line Manager: Should introduce and take through him/herself and introduce to the staff, need to make people feel comfortable, do 1-on-1 Manager		Push HSSE			Use of role players from various areas is good.	Understand and explain what **** is all about Walk away afterwards and realise that it hasn't been a waste		Online **** Internal N/paper: **** Tell - but when do you look at it Noticeboards Keep people in the picture

Erika ****	Get the Lay of the land	HR	Higher level intake often has no induction	Things that are needed to do job, most of which are located in the building - where does one find them?		A document of admin and policy - what do I need to know (where to look) - Links to a Website if necessary (such as ICAS (EAP))		Some one who is not confused		
	Know basics -> e.g. employee service unit	Department Head -> department al meetings	Had to pick things up one's self: There was a job content induction - but it was all file and paper driven - never finished too much info			Almost like a directory of services or a number or person to call		Know the basic things to do job everyday (e.g. Chaffuers to the airport / Library)		

	Some things must be done: Administration	Link with London - umbilical cord with London (Content)	Induction is VERY NB if one is running a department Practical issues: need to be addressed, like real job things Build on the philosophy of **** as a company Senior People have key differences: Budgets, Law Changes (e.g. Interview Questions)			All new employees should press the internet button A roadmap of induction would be helpful Accornyms would be great - Accronym buster		Info gathering -> Where is the info		

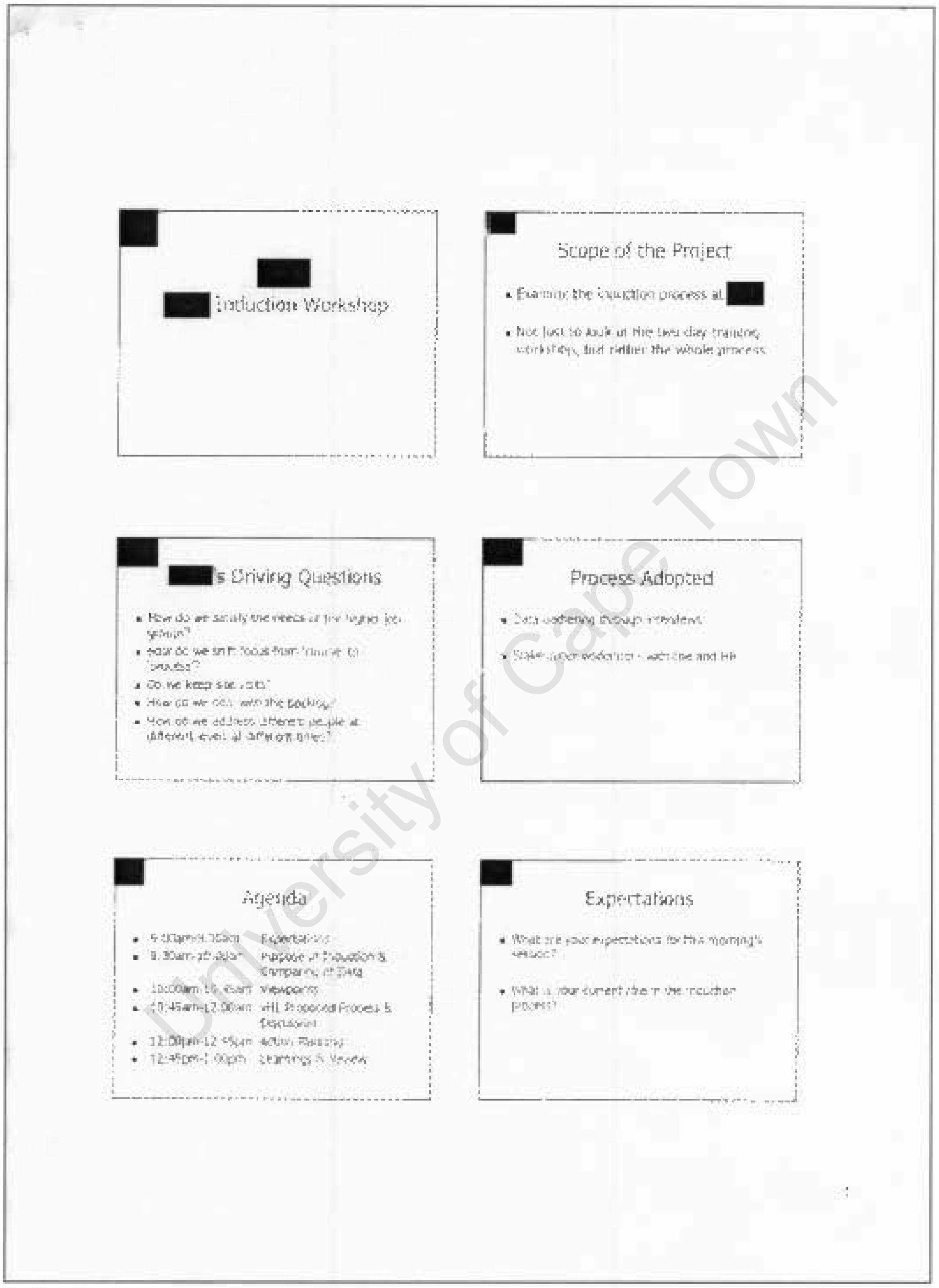
Thanushia ****	Know what **** is all about & **** people	HR - Facilitating - open-ended / group driven	Knowledge sharing a problem	Gone through the business side of things: From refining -> Oil Process -> **** Forecourt		PMP - measured on outputs -> not on process - design own system	Went on Grad Programme: 2 days of presentations from business units - insight into the role of Graduates	Know the questions to ask -> not the answers	Sheel Grad Induction: **** People Services = **** Global HR	Change and understanding of job is an issue
	How do I fit in?	Participants; Grads / Transfers / All other people	Opportunity for overseas travel	Where to go for information		Young ****: Develop and discuss issues: at the moment, Grad specific	The Grad then get together and present their area	Critical thinking		
-	What do I bring to the buisiness?	People who have been there done that - give feedback		Some what of a genealist understanding -> support and business units		**** Better World	See **** from a Personnel perspective, interpersonnel and business	Who to go for - for information transfer		

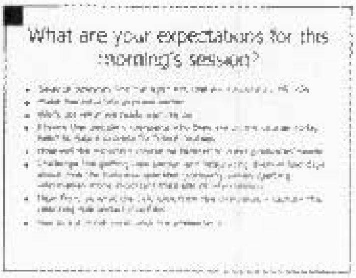
	Also Reputation -> Have I made the right decision?	Senior Leaders - relaxed feel to it when they particiapted (Grads), socialising, brought in culture - open door policy					**** Life Course -> Global Induction -> Run by **** People Services (London)	Be able to see humour		
	**** - people, - unspoken rules, - culture	People from different businesses: Comms, Retail					HR: went to depot in Alberton and was incorporated into the aim / purpose	Exposure to outside **** SA		
		Someone outside **** - Career Development								

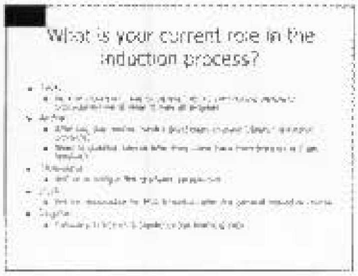
		Line Manager - must be involved: NB because line manager detached from newpeople - it's about investing in people								
Clare ****	Introduction into the company Get to know each department	Line Manager: The person above you	No induction has consequences - induction would speed up knowledge	Basic things -> Everyday things -> Basic ins and outs Nice to know people's names		Books not necessary -> collegues are important -> don't work along => does help		Feel comfortable & know where they were going -> not looking at cost		

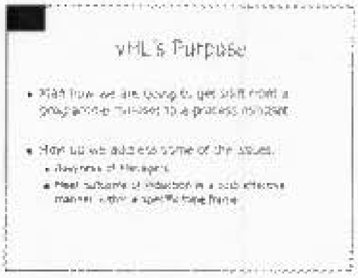
				Know everyone in the department - don't be a stranger						

C.4. Feedback Sessions: Interview Feedback Sessions & Project Scoping

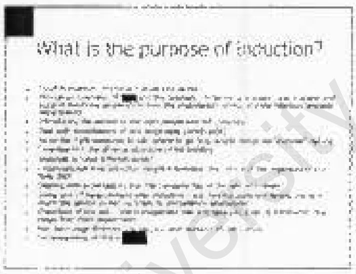


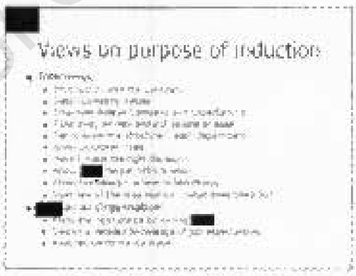

What are your expectations for this morning's session?


What is your current role in the induction process?


Purpose


Purpose
What is the purpose of induction?


What is the purpose of induction?


Views on purpose of induction

2

Comparison

- What are the key differences between a well inducted person and someone who is not inducted?

Feedback

- Interviews
  A Well Inducted Person would look like:
  - Knows where to start
  - Customer focused
  - Understand the business
  - Knows where to find information

Viewpoints

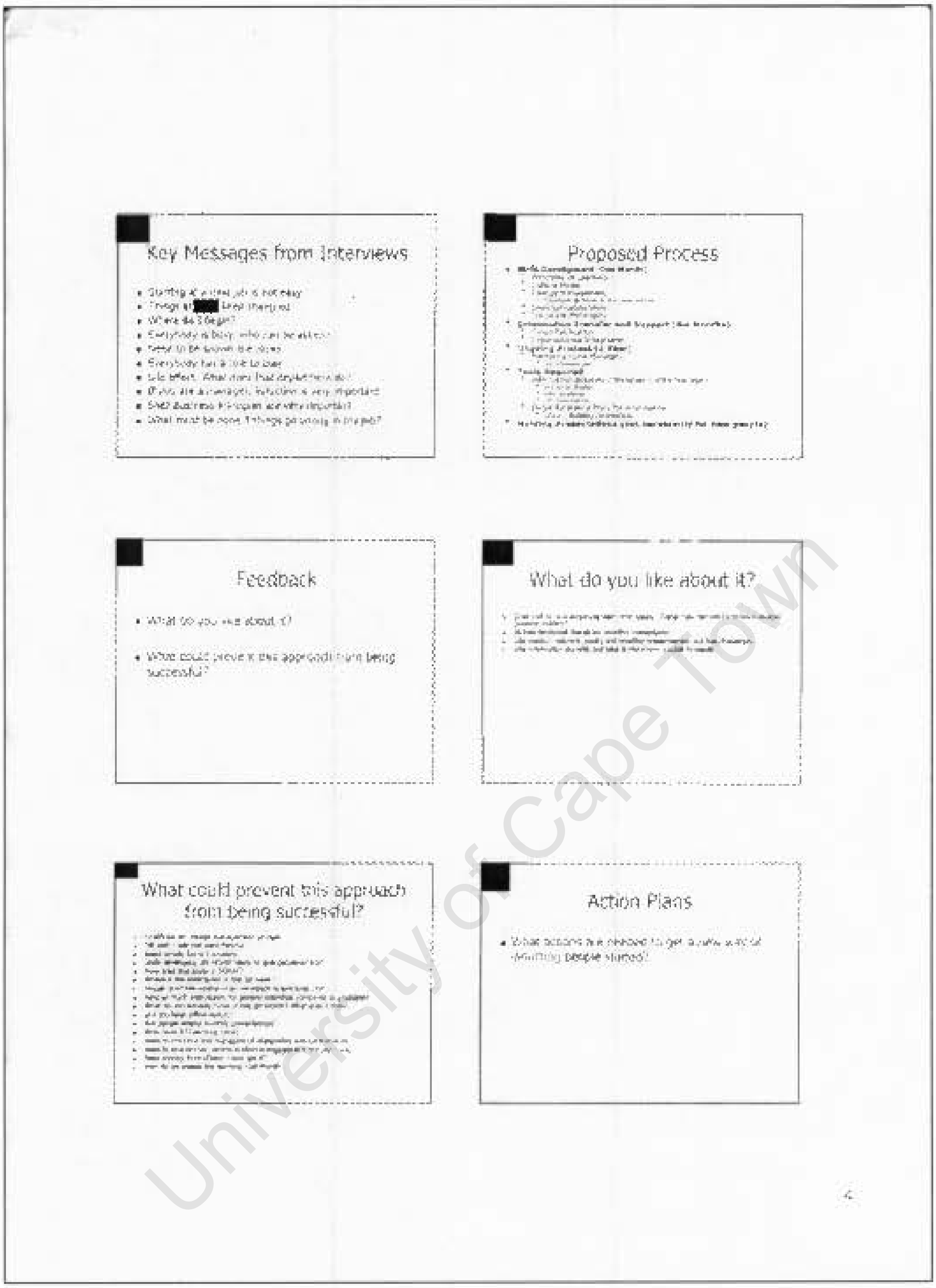
- How is induction seen by:
  - A new employee
  - A new employee's immediate manager
  - HR

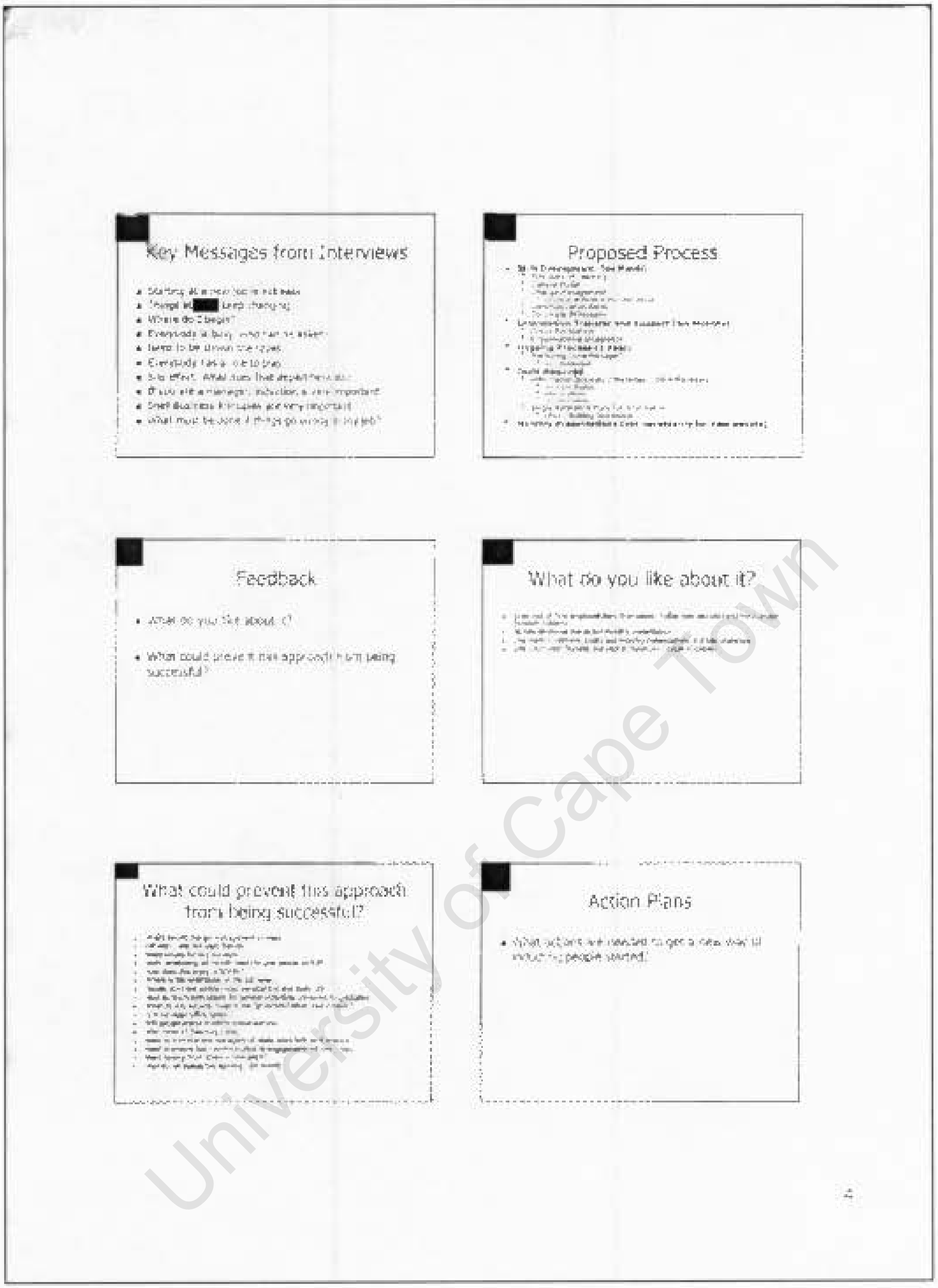
How is induction seen by: The New Employee:

How is induction seen by: The Employee's Immediate Manager

How is induction seen by: HR:

3


Key Messages from Interviews
Proposed Process
Feedback
What do you like about it?
What could prevent this approach from being successful?
What do you like about it?
What could prevent this approach from being successful?
Action Plans


Key Messages from Interviews
Proposed Process
Feedback
What do you like about it?
What could prevent this approach from being successful?
Action Plans
4


Action Plans.


Learnings & Review

Workshop Outputs: What does a well-inducted person look like?

(Competency Based)

- **** Organisational Induction:
    - Feels welcomed, valued and sought after
    - Employee 'integrated' into the **** Culture:
        - Understands the jargon or **** Speak
        - Knows 'how things operate here'
        - Understands internal procedures; including terms and conditions of employment, leave, remuneration, house rules, HSE, grievance and disciplinary procedures etc
    - Understands SOPAF
        - Understands of the various parts of SSnA
        - Understands BEE component of SSnA
    - Know where to seek out information about the various components in the organisation

- Departmental Integration:
    - Understands work routines; including location of facilities, organisational / departmental goals / objectives, job profile, job specification, departmental / organisational Organogram
    - Understands departmental / organisational rules and regulations and the consequences of non-compliance
    - Knows 'who's who'; has been introduced to all the people in the department / organisation with whom s/he is required to interact as part of the work team
    - Understands career paths within the organisation

- Job Integration:
    - Understands his/her responsibilities
    - Understands performance targets
    - Understands policy for appraisal and when to expect a performance review
    - Initial training is outlined the opportunity for further training is understood
    - Know where to seek out information about his / her job and feels free to ask questions

C.5. Design & Document Inputs

C.5.1. Comparison with new Induction and Global Induction

[redacted]

Process:	[redacted]	
Senior Manager Meeting	√	√
Buddy System	√	√
Departmental Introduction	√	√
Documentation for Inductee	√	√
Module 1:		
[redacted]	√	
	√	
	√	
	√	
	√	
Site Visit: Depot	√	√
Site Visit: Retail	√	√
[redacted]	√	
	√	
	√	√
Relationship Development with Line Manager	√	√
Inter-Modular Work		
Departmental Culture	√	
Intranet	√	
Organisational Structure	√	
Industrial Relations	√	
EAP	√	
HIV/AIDS	√	
Module 2:		
Change	√	

Becoming a Highly Effective Learner Personality Compass Diversity Communcation Doing Things Differently	√ √ √ √ √	
MOP	√	
Assessment	√	

C.5.2. Disciplinary Policy

Discipline Policy

Employees are required to maintain standards of conduct and performance in accordance with their job requirements, their contracts of employment and Company regulations. Failure to do so renders them liable to disciplinary action. Such action is designed to be corrective and to improve conduct or performance other than where dismissal is warranted, and should always be taken as quickly as possible after the event.

Responsibility

Whilst senior management is required to ensure that any disciplinary action is consistently applied, direct responsibility for disciplinary decisions rests with the managers who chair the individual disciplinary enquiries and appeals.

Employee Representative

Throughout the disciplinary procedure given below employees may elect to be accompanied and supported by a fellow employee of their choice (the employee representative) and to be assisted by an interpreter. Non-Company staff, however, are not permitted.

Informal Action

Other than in serious cases, first instances of employees failing to meet required standards will be followed by informal action such as, counselling, training or a verbal warning from the supervisor. Depending on the circumstances the supervisor may need to reissue to the employee a statement of his objectives or extracts from relevant Company procedures.

Formal Action

In the event of serious or repeated cases of an employee failing to meet required standards, the Company will take formal disciplinary action, viz:

Written warning

Final written warning

Dismissal with notice

Summary dismissal

Such action taken by the Company will depend upon the seriousness of the case, the employee's previous record and any mitigating circumstances.

Investigation

No formal action will be taken without an investigation to establish the facts. The employee, and, if he so wishes, his representative, will be informed of the reason for the investigation and subsequently any decision to proceed with formal action. Depending upon the seriousness and the circumstances of the case the employee may be suspended with pay during the investigation.

Enquiry

Should investigation indicate that formal action may be necessary an enquiry will be convened. Before any enquiry, the employee concerned will have been notified in advance that he is required to attend and be given details of the reason for it. If he so wishes he may be accompanied by his representative and/or interpreter. Should the employee elect not to have a representative this will be recorded in writing.

In serious cases where the employees may be liable for dismissal the enquiry will be chaired by a Manager superior to the one initiating discipline.

During an enquiry the employee and/or his representative will be given the opportunity to fully present his case.

The employee's immediate supervisor will attend the enquiry and any other person in a position to contribute may also be invited. An HR Consultant will attend only at the request of the employee or the line manager.

As soon as possible following the enquiry the Chairman will convey his decision in writing to the employee and his representative.

Warning

Written warnings will specify in what respect the employee has failed to meet required standards, the time allowed for improvement and the nature of any further action the Company proposes to take if the standard required is not achieved.

The employee is required to sign any such written warning to confirm he has received it. If he refuses to do this, the fact will be recorded on the warning letter and be countersigned by his supervisor and a witness.

A written warning will lapse if no further disciplinary action resulting in a written warning has taken place within 12 months from the date on which the warning was issued.

Appeal

An employee has the right to appeal in writing to the next level of authority at JG3 or above, superior to the Chairman of the enquiry (the Senior Manager) against any written warning or dismissal, within a week of the action being taken.

The Senior Manager will convene an appeal hearing as soon as possible, at which the employee, accompanied by his representative and/or interpreter, will present his grounds for appeal. A member of HR Department and the Chairman of the enquiry will also attend.

Appeal hearings will be conducted by the Senior Manager, whose decision will be given as soon as possible after the hearing in writing and will be final.

Documentation

A written record of all enquiries (5.7) and appeal hearings (5.9) will be made by the member of HR Department and distributed to all parties who were present.

C.5.3. Whistleblower Policy

Introduction

Something may be troubling you, which you think management should know about or look into.

- **You may have knowledge of actual or potential breaches of our Business Principles or of control weaknesses that facilitate fraudulent manipulation of our systems.**
- **You may be under pressure from within or outside the organisation to facilitate or participate in unethical practices.**
- **You may have said something already but to the wrong person or in the wrong way.**

**** Southern Africa is committed to making it acceptable practice for staff to raise genuine concerns or make suggestions about these issues and commits to respond.

This Whistleblowing Policy has been introduced to provide a safe and acceptable way for you to raise your concerns about malpractice, at an early stage and in the right way. Under this policy, the aim is for staff to raise a matter so that it can be addressed in an independent and unbiased way. You are not required to prove your case under this policy, however, you would need to provide sufficient information for management to take appropriate steps.

Where you are aggrieved about matters that concern you personally or may have a vested interest in the outcome please use the Grievance Procedure. This can be found in the on-line Personnel Policies and Procedures Manual.

The Whistleblowing Policy is operated by an independent outside party, Tip Off's Anonymous.

In this way, total anonymity and confidentiality is guaranteed.

View the Tip-Offs Anonymous Slideshow
(PowerPoint Presentation) File Size 329.00KB

Assurances

OUR ASSURANCES TO YOU

If you raise a genuine concern under this policy, you will not be at risk of losing your job or suffering any form of victimisation or retribution from the company as a result. Provided you are acting in good faith, it does not matter if you are mistaken. This assurance does not however extend to those who are found to have raised a matter falsely or maliciously. If you wish to raise your concern anonymously or with your identity known only to specified persons, this will also be respected. (See below).

WHAT TYPE OF CONCERNS SHOULD BE RAISED UNDER THE WHISTLEBLOWING POLICY?

Actual or potential breaches of our Statement of Business Principles, or compromises of our processes and procedures which would facilitate a breach, for example:

- **Conflicts of Interest and abuses of office**
- **Frauds, Bribery and Other Corrupt Practices**
- **Insider Dealing and Illegal Information Brokering**
- **Political Payments under whatever guise**
- **Compromise of our HSE standards**
- **Abuses of the Community Development Programmes**
- **By-passing of the Business Controls Framework**

WHO CAN USE THIS POLICY

The Whistleblowing Policy may be used by all Staff, Contractors, Suppliers and their staff, Joint Venture Partners, and by members of the Communities. It is open to staff in South Africa, Namibia, Botswana, Swaziland, Lesotho and Mocambique

Raising Concerns

HOW TO RAISE A CONCERN:

If you are a staff of **** we hope that you will be able to raise your concern first with your line manager. If you are unable to do this for any reason or if you are not a member of staff, use any of the methods below :

You can raise a concern under the Whistleblowing Policy in three ways.
Use the Whistleblower Hotline.

1. Call:

0800 203 578

Or

+27 31 5086477

any time, 24hrs a day, 365 days a year. Your call will be answered by a trained professional in your preferred language; either English, Afrikaans, Xhosa ...., who will record your concerns. You will not be required to give your name and your call will remain confidential. However, you should try to provide sufficient detail for Management to investigate your concern.

2. Use the Whistleblower E-mail Address :

*****@tip-offs.com*

3. Use the Whistleblower Hotfax number:

0800 00 77 88

The Whistleblower Hotmail Account Submission Form has been structured such that the e-mail address of the sender and the computer from which the mail is sent is not revealed. You are also given the option of disclosing or protecting your identity. Messages will go directly to our external service provider. In the same way, systems have been designed to ensure that faxes sent via the Hotfax number will not display the sending fax number on the receipting machine.

CONFIDENTIALITY

You may wish to raise a concern in confidence under this policy. If you ask us to protect your identity, it will not be disclosed by our service provider to any staff member or member of Management within ** without your consent. However, the situation may arise where it will not be possible to resolve the matter without revealing your identity (for instance where you are required to give evidence in court), Under such circumstances our service provider will act as intermediary between yourself and the Company in order to agree an acceptable way forward.**

You may also choose to raise a concern anonymously. However, remember that if you do not tell us who you are it may make it more difficult to look into the matter, to protect your position or to give you feedback. If you do raise a concern anonymously, you will need to provide sufficient facts and data to enable management look into the matter without your assistance.

HOW MANAGEMENT WILL RESPOND

Once you have disclosed your concern, the following steps will be taken:

- **Tip-offs will be forwarded to the Business Integrity Department for investigation**
- **Management will look into the matter to make an initial assessment and decide on what action is appropriate. This may take the form of an internal investigation or a more formal investigation involving the use of external specialists and/or the police.**
- **If you have requested feedback, and have disclosed your identity, you will be provided with feedback on actions taken. However, please note that we may not be able to make full disclosure where this infringes on our duty of confidence to another person.**

C.6. Inductee Process Plan

* * * * INDUCTION

INDUCTEE MANUAL

POSITIVE CHARGE INTERNATIONAL

Welcome to ****. We are all confident that you are going to enjoy your working experience at ****.

The document is seen as a support document for your journey through your induction into ****. You Line Manager is your point of reference for any queries. This guide is to facilitate your induction process and is assist where and when possible.

Your Line Manager

Your Line Manager should be seen as a powerful resource. He or she will provide a key mentoring and coaching role in your induction into ****. Your Line Manager is an integral part of your learning about the organisation and therefore, it is important to engage him or her on an appropriately regular basis.

It is important for you to discern what his or her expectations are of your performance. It is best that you right down such a dialogue at it will enable you to refer to it later if necessary.

Your Induction Process:

Your induction started before you joined ****. You have gathered information about **** from the first time you engaged the organisation. The induction process is aimed at adding to that knowledge and getting you efficient and effective in your job in the shortest space of time.

At this point in your induction you should have been introduce to your departmental 'buddy'. The role of the buddy is to offer assistance in information about the day to day running of the department. Information that would be of assistance may include:

- The structure of the department
- The location of key areas on the departmental floor
- The best places to get some food
- The people to speak to in sorting out IT issues
- The fire exits from the building
- The HR Business Consultant for the department
- The manner in which the leave application forms are completed

The principle is that any and all questions regarding your employment at **** are appropriate.

Engaging the Buddy:

The departmental 'Buddy' is a key support role for the new employee to assist with the information gathering and general settling in of the new person. It is an individual in the department who has been there for a reasonable length of time and 'knows the ropes'. If the department is new, putting people in pairs is also effective.

The buddy is to assist with cultural integration and on-point access to operationally necessary information. The person concerned should be identified and briefed at least two weeks prior to the new employee's arrival.

The buddy helps the employee feel at home and also assists the new employee in understanding **** as an organisation, more specifically the culture and politics and the 'rules'.

Objectives:

- To provide the new employee with a point of contact for general queries regarding day-to-day operational issues
- To help the new employee integrate with **** by providing access to someone who is familiar with **** culture, attitude and expectations

****:

INDUCTION WORKSHOP

(MODULE 1 & 2)

Overall Programme Objectives:

After completion of this group of workshops, learners will have an understanding of **** as an organisation and be in a position to work both efficiently and effectively in their new company. The overall objective of this programme is to facilitate the employee's transition into ****. This is by ensuring the following:

- Ensuring they feel valued and sought after
- They are integrated into their team and role
- They are assimilated into the **** Culture
- They become optimally effective in their jobs as soon as possible after joining and start building long term career plans

Specific Programme Objectives:

Module One Objectives:

The aim of this module of induction is to provide an opportunity to engage employees about their introduction to ****. This objective is achieved by looking at the following areas

- ****'s Business Principles
- Visiting a couple of ****'s operational sites
- Providing an opportunity to discuss some key learnings about **** as an organisation
- Develop an understanding of ****'s Culture
- To create a common language and understanding of **** language

Preparation for Module 2:

- Looking at Departmental Culture
- Learning about the departments:
    - Your Department
    - Department 1
    - Department 2
- Learning about the **** Intranet
- **** Organisational Structure
- Industrial Relations
- HIV/AIDS policy and assistance
- Employee Assistance Programme (EAP)

Module Two Objectives:

The aim of this module of induction is to provide an opportunity to engage employees about their introduction to ****. This objective is achieved by looking at the following areas

- Reviewing the knowledge gained through the Inter Modular Work
- Gaining an understanding of how you work and learn through various tools and techniques
- Providing an opportunity to discuss some key learnings about **** as an organisation
- Explore the area of diversity and the challenges it brings
- Developing communication skills that are appropriate for ****

Duration and Target Population:

- Any new member of staff, even if they were previously contracting, from Job Grades 4-8 goes on induction within 12 months of joining the company.

- Those members of staff above Job Grade 4 are grouped together and undertake an induction workshop once per year. It is deemed to be more beneficial to group higher Job Grades together as the process becomes more beneficial.

The workshop is four days, broken into two modules taking place one month apart. There is work required to be completed by the participants between Module 1 and 2 for use in Module 2.

Jargon:

- **Onboarding**: Describes Induction in other parts of the world.

C.6.1. Process Review: Line Management Model Review

Sat, Nov 18, 2006 6:22 PM

[redacted] **meeting with Line Managers**

Date: Wednesday, April 7, 2004 11:41 AM
From: Santovito, Cindy [redacted]
To: <sean@positive-charge.co.za>
Conversation: Shell Induction meeting with Line Managers

Hi Sean, I tried phoning you today but believe you are away until after Easter. If I remember correctly we had scheduled a meeting with line managers to explain the Induction process for 8th April 2004 however I had indicated a while ago that I had not yet communicated this to the line managers. I just wanted to let you know that I still haven't been able to do this & wanted to postpone the meeting.......

Just to keep you in the loop the new learning manager has been appointed and she will be joining our team on 1st May 2004. She may need a few months to settle in as [redacted] Learning is a totally [redacted]nt for her although she is from within [redacted] Birgitte now has the [redacted]osition so there will be a replacement for her too sometime!

Enjoy the break & let me know when you are back!

Kind regards,
Cindy

Cindy Santovito (neé Pearce)
Support Assistant - HR Learning

[redacted]

Page 1 of 1

C.6.2. Line Manager Outputs Examples

Question asked: What areas need to be focused on in induction (in other words, what do you think is important in induction)?

- ~~[illegible]~~
- CONCENTRATE ON THE BASIC THINGS - THEY ARE QUITE IMPORTANT

- LINE MANAGER HAS A KEY ROLE TO PLAY.
- CREATE A "SENSE OF BELONGING" IN THE MIND OF THE NEW EMPLOYEE

- ALWAYS REFER AND COMMUNICATE WITH NEW EMPLOYEE TO MAKE SURE THEY ARE COMFORTABLE.

C.6.3. Learner Feedback Examples

Sean Greathead

From: Pearce, Cindy [redacted]
Sent: Monday, August 25, 2003 2:11 PM
To: 'Sean Greathead (Work)'
Cc: Davy, Birgitte [redacted]
Subject: Induction, 20-21 August 2003

Hi Sean, I just thought I'd forward one of the participants e-mails to make your day!

Thanks again for all your help, it was great working with you & I look forward to many more workshops!

Kind regards,
Cindy

[redacted]

> -----Original Message-----
> [redacted]
>
> Hello Cindy
>
> Just a short note to say thank you for the wonderful Induction Course,
> which I thoroughly enjoyed. From my 'research', it would seem that
> this was a much better package altogether. I especially enjoyed the
> feedback sessions and, of course, realizing that I knew more about
> Shell than I thought. Visiting the refinery was a real highlight for
> me as well (just a pity the foreigner had to get back to the office so
> early!)
>
> Many thanks to Sean for the wonderful presentation and learnings at
> the Induction Course. Well put together and well thought out, as we
> seem to have taken away with us the most learnings, in contrast to
> previous groups. I gather from other people that I have spoken to,
> that the feedback sessions (where I gained the most insight about
> Shell) is new (previously there were different speakers from the
> various departments, who came in and gave a short overview of their
> departments), working together in groups to gather feedback is new
> and, of course, the 'popping' is new. I also like the fact that
> no-one was to be excluded from 'popping'!
>
> Many thanks again for a truly, excellent Induction Course.
>
> Regards
>
> Chantal Ching
> [redacted]

Pearce, Cindy [redacted]

From: Landry, Jared [redacted]
Sent: Thursday, August 28, 2003 12:22 PM
To: Pearce, Cindy [redacted]
Subject: RE: Induction feedback

Overall, good course for new hires

-----Original Message-----
From: Pearce, Cindy [redacted]
Sent: Thursday, August 21, 2003 5:13 PM
To: Landry, Jared [redacted]
Subject: Induction feedback
Importance: High

Hi Jared, just a reminder that we would really appreciate your feedback. Relating to the 2 day workshop, please could you feedback on

1 thing you liked/would keep
[Landry, Jared R [redacted] *]* Acronyms as those will likely be around and grow
1 thing you would add
[Landry, Jared R [redacted] I would include the current CVP materials for retail, inclusive of image guides/templates that field force uses to inspect stations so that workers understand the focus and can watch for these things at the sites they visit and do business with.
1 thing you would change
[Landry, Jared R [redacted] Forum, the room needs to be larger so people can easier interact with each other. Force people toswitch groups over the days to get perspectives from others. Keep them from staying with the Pal that they work with daily. This should enrich the experience

It was great meeting you!

Kind regards,

Cindy Pearce
Support Assistant - HR Learning

[redacted]

1

Feedback: Feb 2004:

Hi Cindy
Thanks for the last two days, was well-organised.
I enjoyed it and learnt a lot.

Please could you keep me informed about the Oil Cooking course.

Thanks and regards
Mariam

Post Induction Feedback: Module 1 & 2: May 2004 – June 2004:

What was your experience in the induction programme you attended?

It made me feel comfortable in my new position and gave me a better' overall" idea of what "The Company" [redacted] was all about.

The relaxed and easy going way in which the programmed is conducted gives you the confidence to ask questions and raise concerns that you might never be comfortable doing in the normal daily office set up.

What was your greatest learning in the process?

I learnt that there is a lot of room for self development and self advancement within the organisation and that there are various tools available to assist the employee along the way. I also learnt that every one is an individual and that the way in which we achieve varies from person to person based on our personalities and the way we learn. [redacted] is a organisation with a lot of different departments , but the goal is the same throughout - to achieve excellence in everything we do.

What was your greatest frustration in the process?

I didn't really experience any frustrations.

What did you need from the induction process that you did not get?

It would have been very valuable if we could learn how to use People soft. The way in which you apply for leave, where you will be able to see any available positions ect, would be of great help.

How has the induction process changed the way in which you work?

I have definitely become more focused and more aware of how and why I do certain things. I also find that I question what I do a lot more : Is this the best way to do it? often comes to mind. I am definitely more confident in the way I approach challenges.

Do you feel that the induction process has made you more efficient and effective in your job and in what way do you think this has happened?

The induction course is very valuable it immediately eliminates the feeling of "I am a stranger". It creates a feeling of belonging and gives a new employee a basic understanding of where he/she fits into the organisation.

Do you feel that the induction process has reduced the length of time it will take you to be fully component in your new position in [redacted]? (If you could put some numbers to illustrate the length of time, that would be valuable).
I believe that it can take a new employee anything from 18 months to 20years to be become competent in their new positions. If I apply all the learnings from the Induction course I think I could be competent in my position within a year if not less.

Additional: We really had a great time at the course and learned some valuable skills. Thank you for making the process so much easier for us.

Module 1: June 2004 Outputs: Final Ponder / Workshop Review

After 2 days I actually feel quite deflated as opposed to inspired – with the organisation changing or me realising the level of instability and unsettling and lack of communication

Lack of communication due to rapid change results in the gap between the 'left hand' knowing what the 'right and' is doing. A saying I heard and quite like as it fits our situation is "we are building a ship and sailing it at the same time".

I've gotten a better understanding of [redacted] as an organisation and the different departments and how they fit together. The depot visit was also very good. One now has a picture of the values, how they are structured and the downstream consequences of not living up to the. The Keys I will apply and use to analyse situations. And I also have an understanding of the [redacted] culture.

This has helped us in thinking about "how will one manage it (the change)?", "what is expected of me?" and that keeping your eye on the ball is the short term goal.

The [redacted] values stood out for me and I now understand the common goals of the company, acronyms and workflow. Depot visit was great. And one of the things I learnt was "Rather understand something than memorise it".

Importance of shell brand and it's worth, me working for [redacted] and keeping this up.

How important [redacted]'s Business Principles actually are. If you want to change a good organisation to a great organisation you need to know where you come from.

[redacted] organisation is beginning to fall into place – the cluster of businesses and what they do is crystallising. The Keys are important and can be used in daily life and the re-iteration of values and [redacted] was great.

I like the way values were put across and how important they are to the bottom line. It is important to me that they be lived. [redacted] are very important and equally important is these being communicated to staff.

You do have to live the values and not it's not always easy but it needs to be done.

Module 2: July 2004 Outputs: Emailed Comments:

Hi Sean

Once again, thank you so much for the wonderful input and valuable lessons learnt from the induction course.

Kindest regards

Caren Green

C.6.4. Induction Design & Process Documentations

INDUCTION INDEX

	Location:
Induction Process: Process Guide Comparison with SWW Comparison with previous approach	**Section A**
Coordinator / Process Facilitator Manual:	**Section B**
Line Manager Manual:	**Section C**
Departmental Buddy Manual:	**Section D**
Inductee Guide:	**Section E**
Induction Workshop Module 1 & 2 Overview:	**Section F**
Induction Module 1:	**Section G**
Induction Inter-Modular Work:	**Section H**
Induction Module 2:	**Section IJ**
Induction Module 1: Facilitators Guide	**Section K**
Induction Module 2: Facilitators Guide	**Section L**
Induction Module: Self-Study for Departmental Transfers	**Section M**
Card Template	**Section L**

C.6.5. Example Data from Induction Module Implementation

Sample Joining Instructions for the Induction Module

Sat, Nov 18, 2006 6:23 PM

Subject: FW: Induction-CT, 21 & 22 June 2004
Date: Thursday, July 8, 2004 12:56 PM
From: Sean Greathead (PIC.ZA) <sean@positive-charge.co.za>
To: <sindi@positive-charge.co.za>
Conversation: Induction-CT, 21 & 22 June 2004

-----Original Message-----
[redacted]
Subject: Induction-CT, 21 & 22 June 2004
Importance: High

Dear New Employees/Nominees,

Welcome to [redacted]

As part of the Induction process, you are cordially invited to attend [redacted] local induction programme with Module 1 commencing 21st June 2004 . Just to draw your attention to the fact that the dates have changed slightly from what was published on our website and we apologise for any inconvenience caused. We hope that you will still be available to attend on these new dates. **please confirm by latest Friday 28th May 2004 whether you will or will not be able to attend.**

The programme consists of 2x 2-day modules, one month apart, with inter-modular work in between, i.e Module 1 is scheduled for 21st & 22nd June, Module 2 is scheduled for 21st & 22nd July and the inter-modular work takes place between 23rd June & 20th July 2004. **It is vital** that you attend **BOTH modules** to get the full benefit of the induction programme. In case they were not aware of this, please bring it to your line manager's attention.

I have attached an overview of the programme as well as Joining Instructions & am looking forward to meeting you on 21st June 2004.

<<JOINING INSTRUCTIONS_CT_June_2004.ZIP>> <<Induction_obj_mod1 2_overview_final update.ZIP>>

Kind regards,
Cindy

Cindy Santovito (neé Pearce)
Support Assistant - HR Learning
[redacted]

Page 1 of 2

Look forward to seeing you

INDUCTION

- **Dates:** **17th & 18th February 2004**
- **Time:** **8.30am(sharp) – 5.00pm (approx.)**
- **Venue:**
  Greenways (hotel)
  1 Torquay Avenue
  Upper Claremont
  Tel.: 761 1792
- **Map/Directions:** http://www.greenways.co.za/
  Once in website, click on LOCATION on left side for the map/ directions.
- **Transport:** **Should you require transport to/from **** House/Greenways, please let me know by latest Wednesday, 11th February 2004.**

- **Dress Code:**
  As you would for work, with comfortable shoes for site visits on day 1.
- **Dietary Requirements:**
  please let me

Induction Coordinator:

[redacted]

[redacted]duction Workshop: Module 1

Programme: Day One

		Timeframe
1.	Introduction Discussion of the course objectives; participants formulate their own objectives	45 min
2.	Introduction to [redacted] Short Presentation on 'What [redacted] is all about?' Some further discussion on the different parts of [redacted]	60 min
3.	Becoming a Highly Effective Learner A practical task which reveals the power and usefulness of questioning	90 min
4.	HSSE [redacted] Short Presentation on 'Health, Safety, Security & the Environment'	60 min
5.	Site Visits Visit to a [redacted]on Centre	90 min
6.	Ponder Looking at where the participants have they come from and what they have learnt today	30 min

POSITIVE CHARGE INTERNATIONAL

[redacted]

[redacted] Induction Workshop: Module 1

Programme: Day Two

		Timeframe
7.	Review of Previous Ponder Review of where have you come from and what have you learnt	30 min
8.	Site Visits Visit to a [redacted]	60 min
9.	Feedback from Site Visits Reviewing the learning and understanding at the site visits	15 min
10.	[redacted]	90 min
11.		90 min
12.		60 min
13.	Final Ponder Looking at where have you come from and what have you learnt	30 min

POSITIVE CHARGE INTERNATIONAL

[redacted] [redacted]uction Workshop: Module 2

Programme: Day One

		Timeframe
1.	Introduction Discussion and review of the course objectives; participants review their previous objectives	30 min
2.	Review of Inter-Modular Work Discussion and review of work undertaken by the participants between the two modules.	120 min
3.	Change Examining change within [redacted] and what it means	60 min
4.	Continuation of Review	60 min
5.	Becoming a Highly Effective Learner Developing some understanding and skills of learning at work	120 min
6.	Ponder Looking at where the participants have come from and what they have learnt today	30 min

 POSITIVE CHARGE INTERNATIONAL

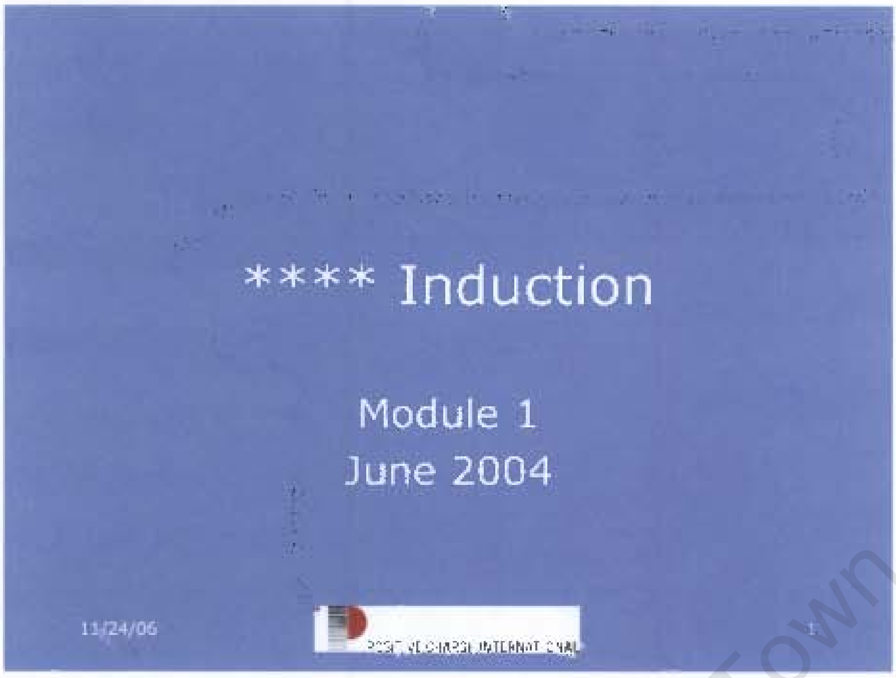
[redacted] [redacted]nduction Workshop: Module 2

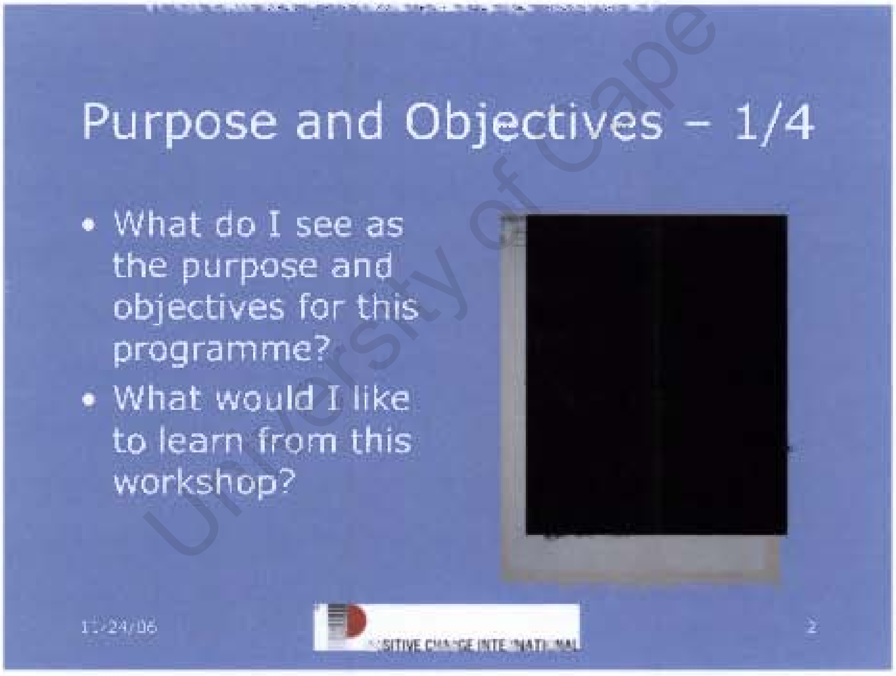
Programme: Day Two

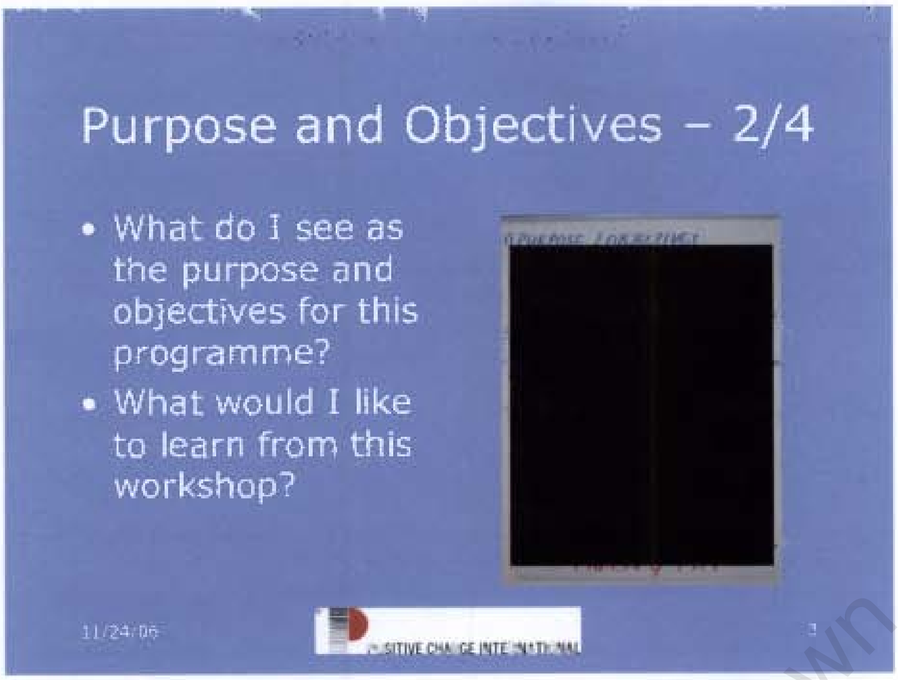
		Timeframe
7.	Review of Previous Ponder Review of where you have come from and what you have learnt	30 min
8.	Learning Styles Examining the different types of learning styles at Shell	90 min
9.	Diversity Examining diversity within different cultures and personalities	90 min
10.	Communication Looking at communicating effectively	90 min
11.	Final Ponder Looking at where you have come from and what you have learnt	30 min

 POSITIVE CHARGE INTERNATIONAL

Induction Workshop Outputs



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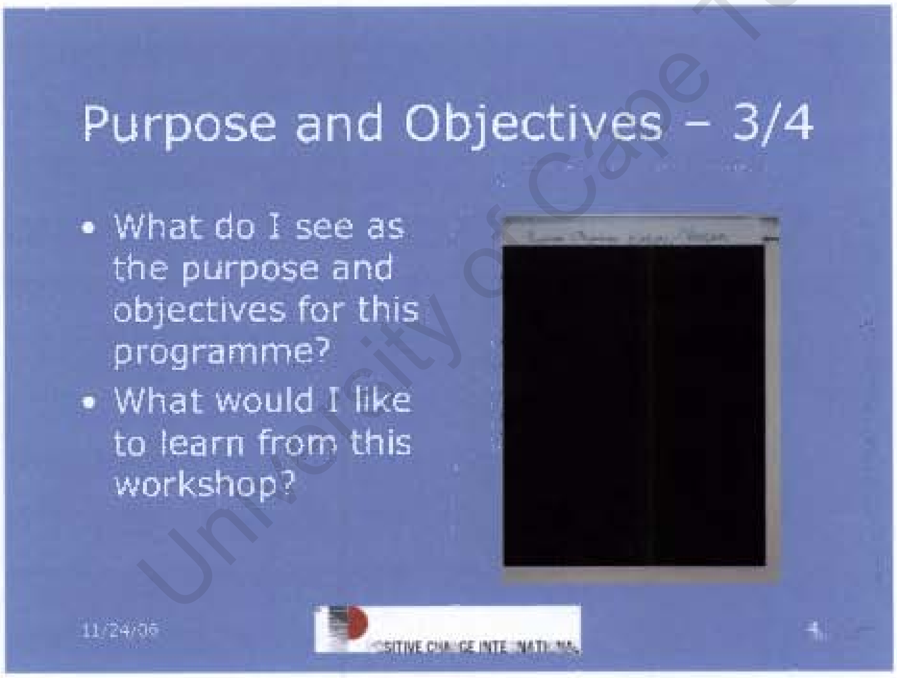
• What do I see as the purpose and objectives for this programme?
• What would I like to learn from this workshop?
11/24/06

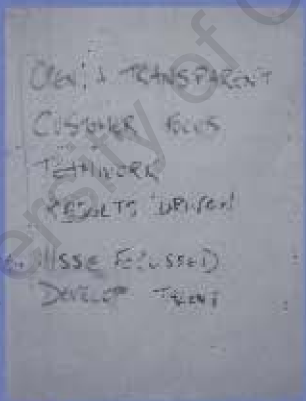

Purpose and Objectives – 3/4
• What do I see as the purpose and objectives for this programme?
• What would I like to learn from this workshop?
11/24/06

Purpose and Objectives – 4/4

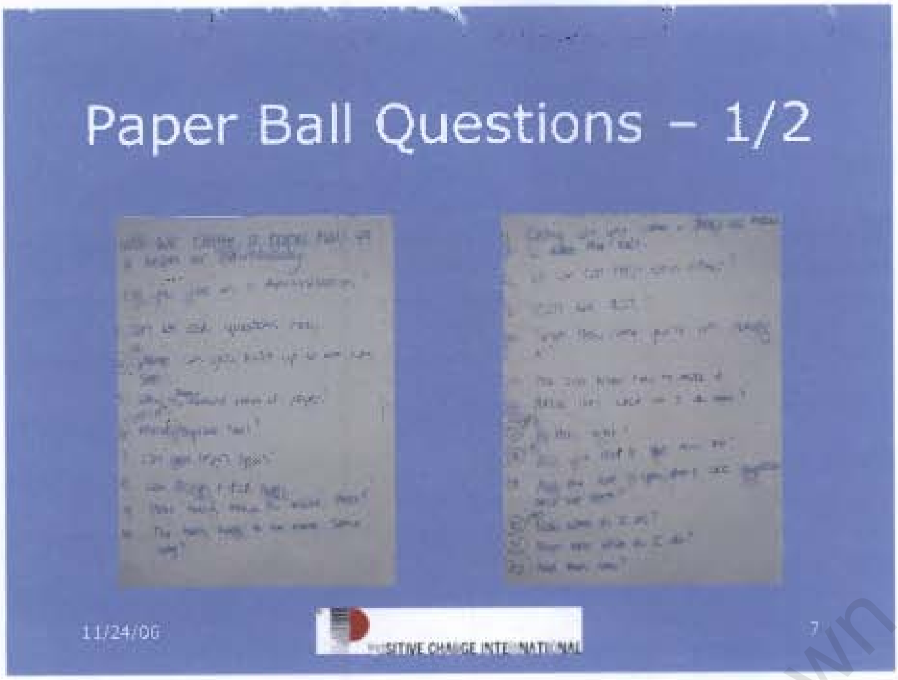
- What do I see as the purpose and objectives for this programme?
- What would I like to learn from this workshop?

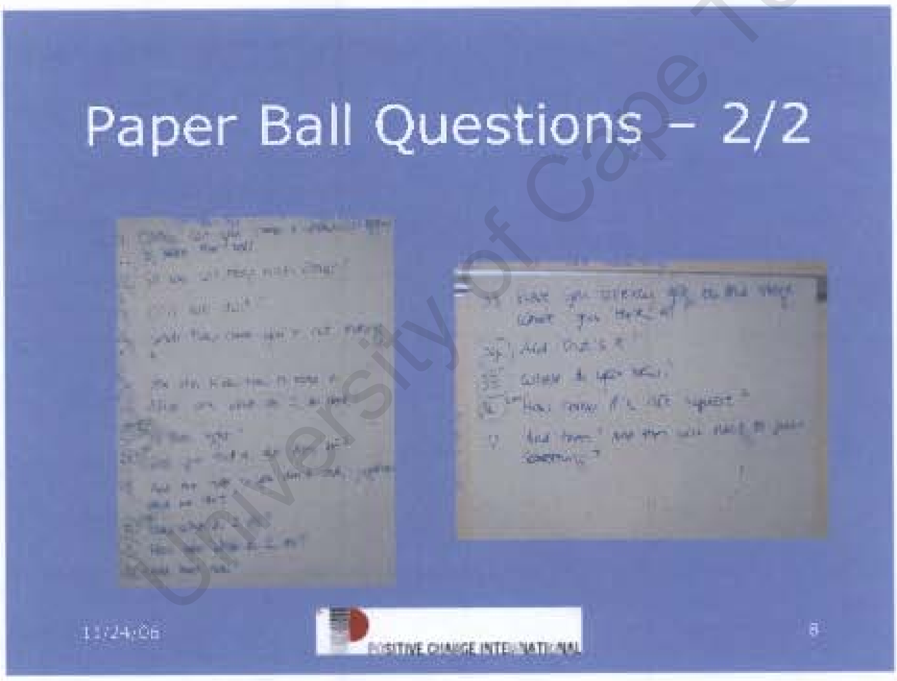
11/24/06 SITIVE CHANGE INTERNATIONAL 5

**** Values

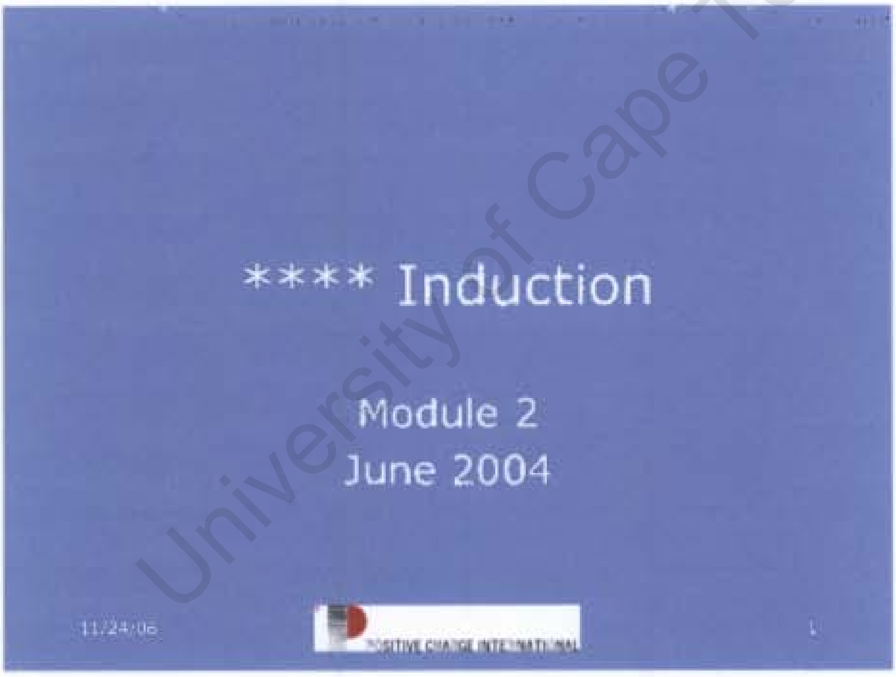


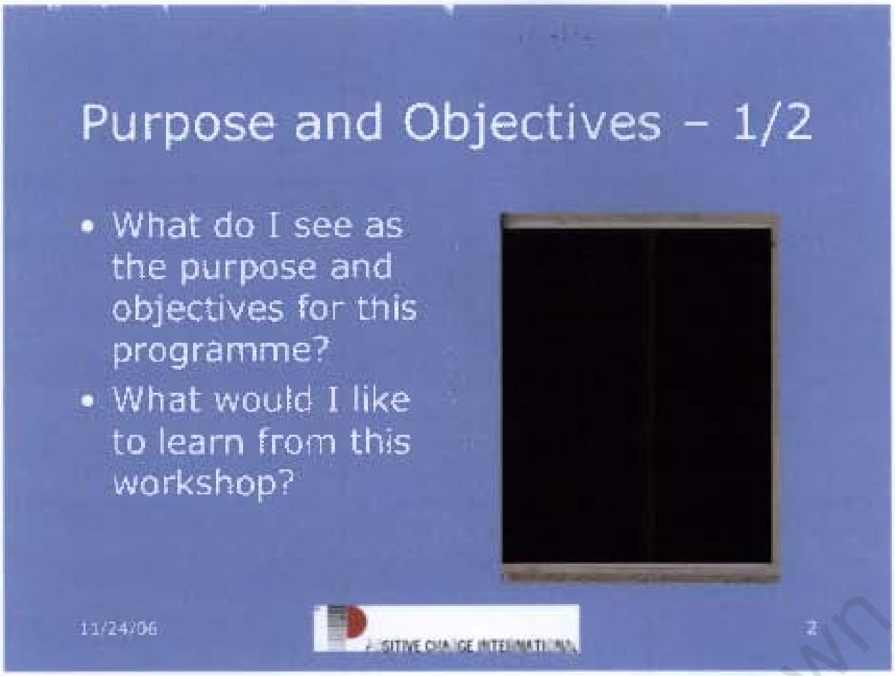
11/24/06 SITIVE CHANGE INTERNATIONAL 6

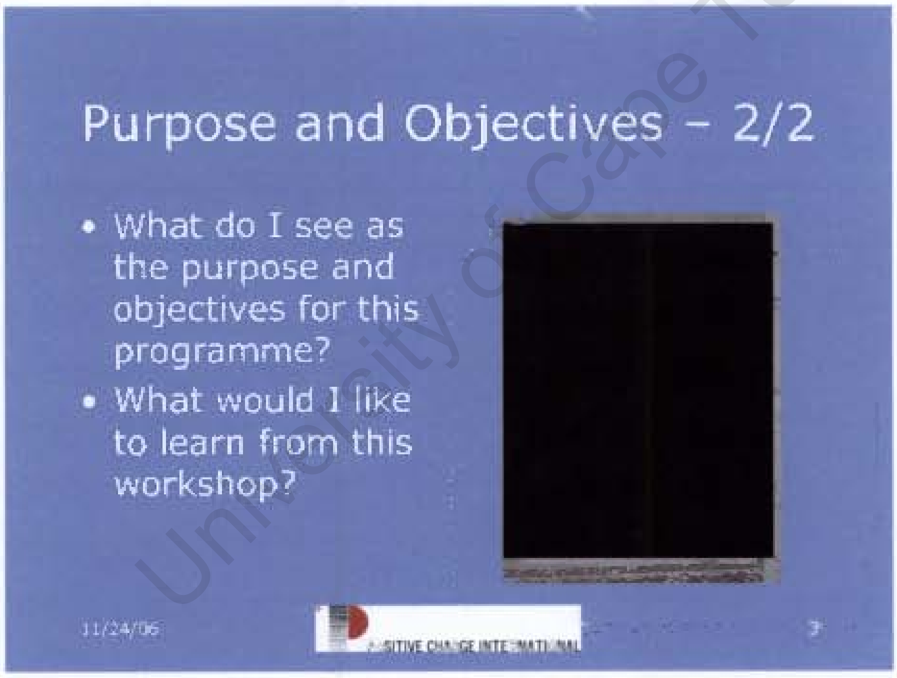

Paper Ball Questions – 1/2
11/24/06
POSITIVE CHANGE INTERNATIONAL
7


Paper Ball Questions – 2/2
11/24/06
POSITIVE CHANGE INTERNATIONAL
8


Using the Culture Model
11/24/06
POSITIVE CHANGE INTERNATIONAL
9


**** Induction
Module 2
June 2004
11/24/06
POSITIVE CHANGE INTERNATIONAL
1


Purpose and Objectives – 1/2
• What do I see as the purpose and objectives for this programme?
• What would I like to learn from this workshop?
11/24/06
2


Purpose and Objectives – 2/2
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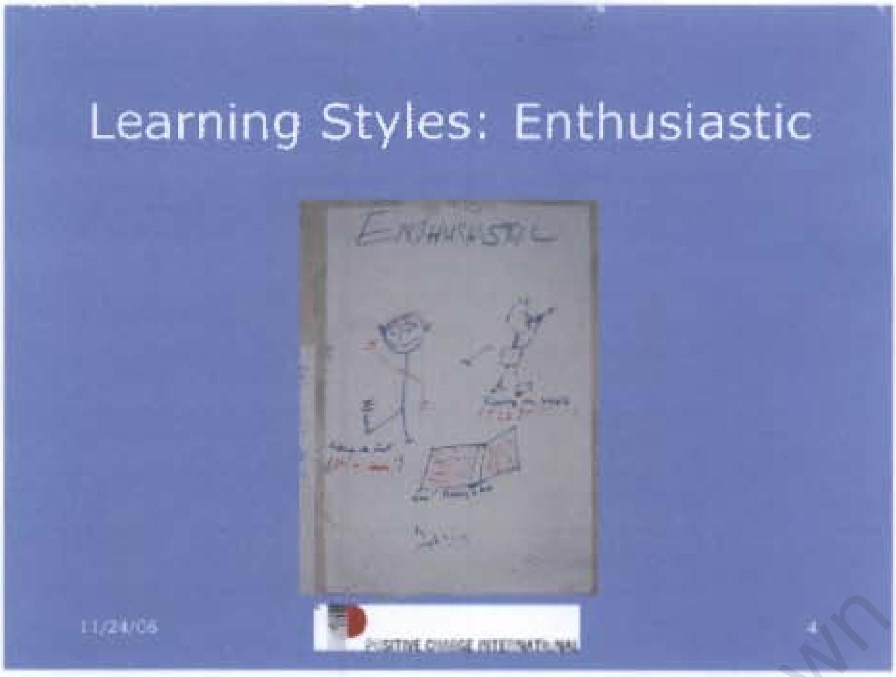
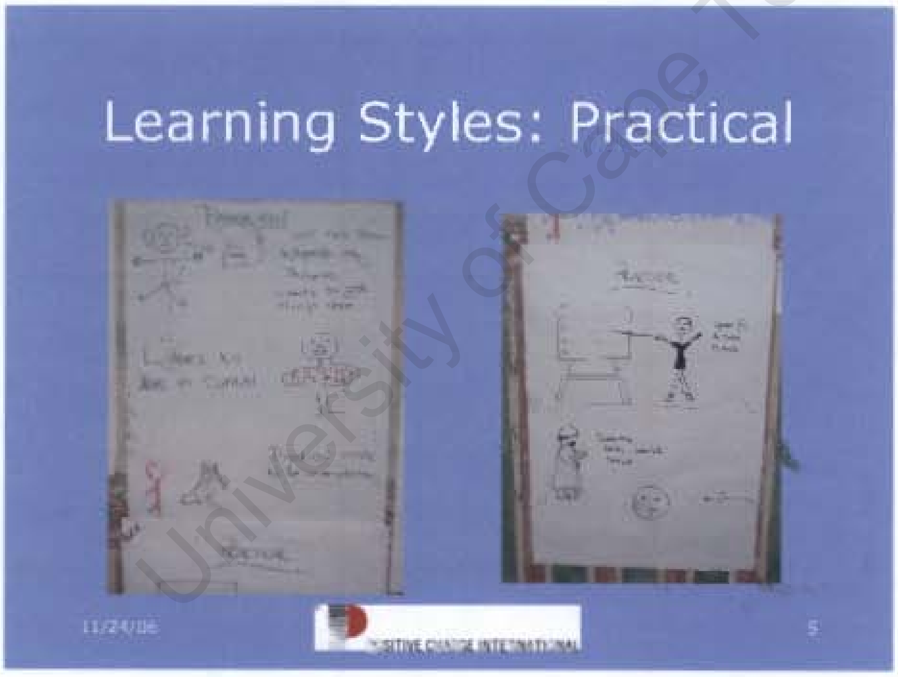
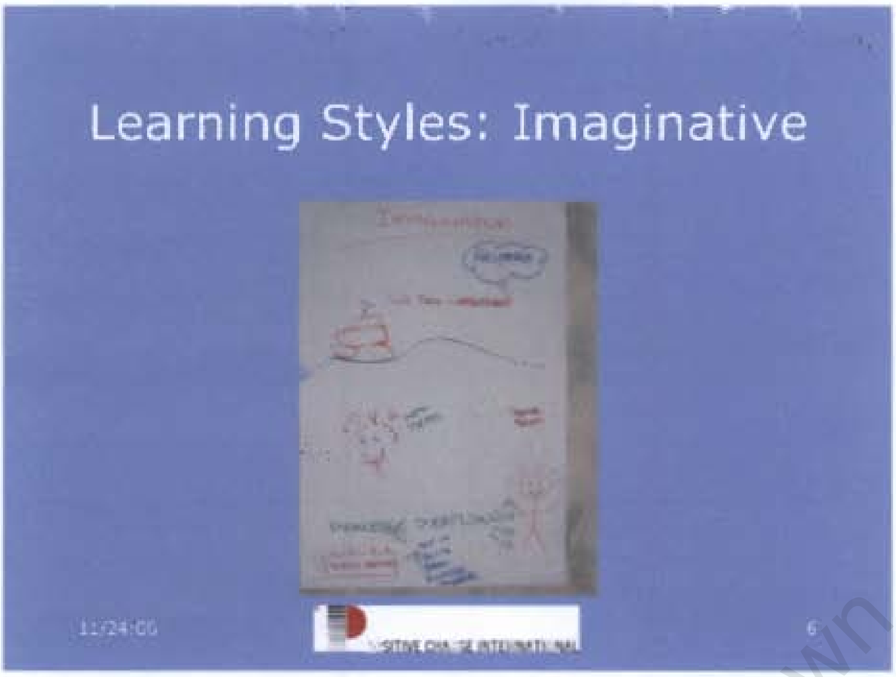
• What would I like to learn from this workshop?
11/24/06
3


Learning Styles: Enthusiastic
11/24/06
4


Learning Styles: Practical
11/24/06
5


Learning Styles: Imaginative
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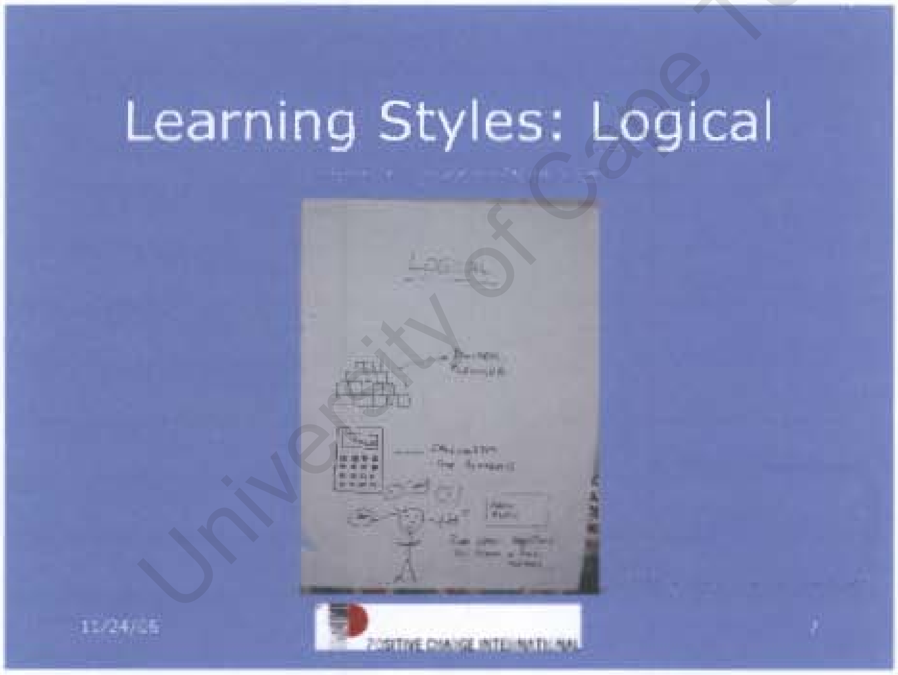
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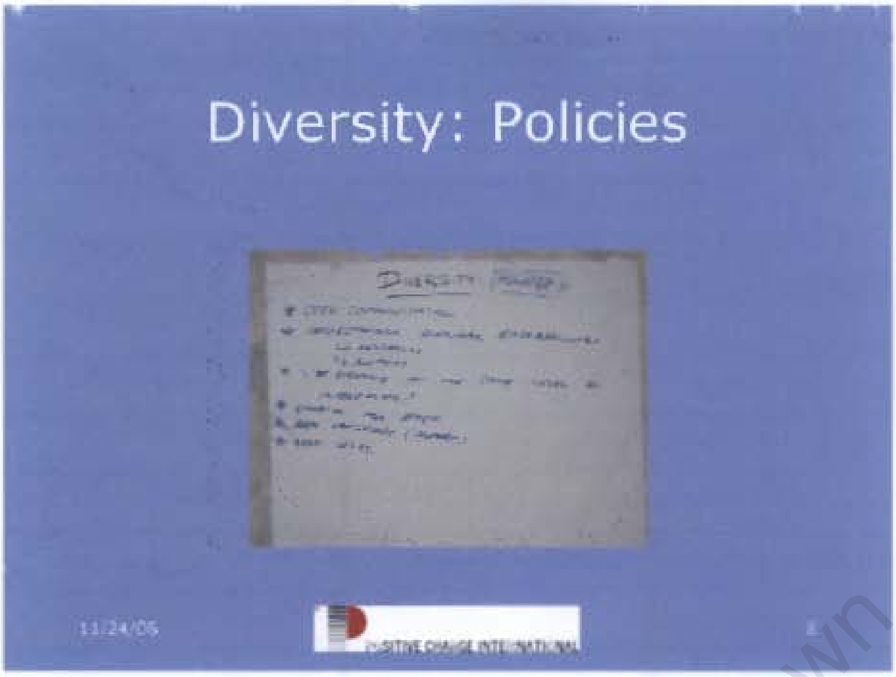
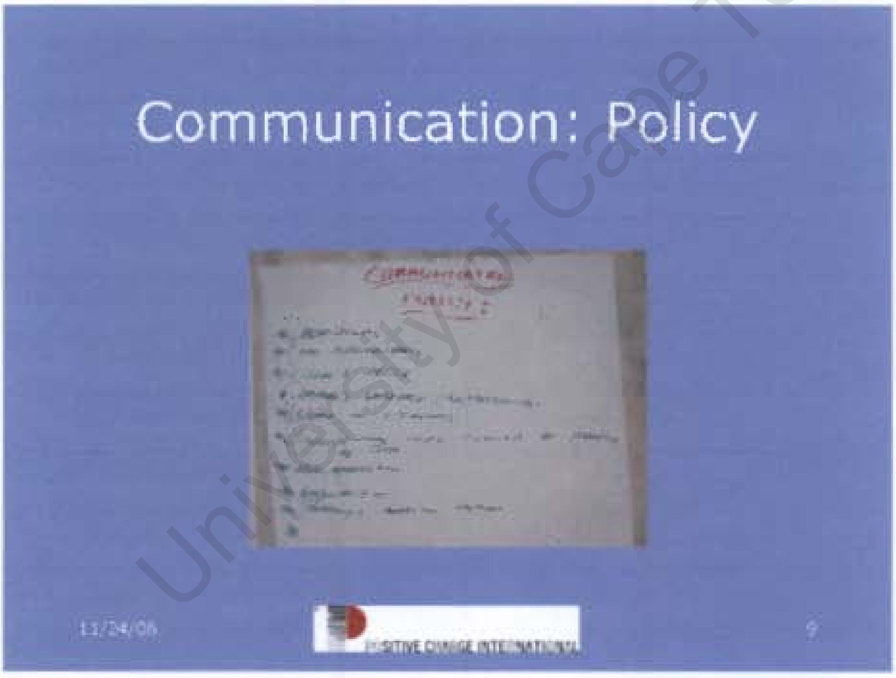

Diversity: Policies
11/24/06
POSITIVE CHANGE INTERNATIONAL
8


Communication: Policy
11/24/06
POSITIVE CHANGE INTERNATIONAL
9

C.6.6. Example Final Ponder / Workshop Reviews at the end of Module 1

- After 2 days I actually feel quite deflated as opposed to inspired – with the organisation changing or me realising the level of instability and unsettling and lack of communication

- Lack of communication due to rapid change results in the gap between the 'left hand' knowing what the 'right and' is doing. A saying I heard and quite like as it fits our situation is "we are building a ship and sailing it at the same time".

- I've gotten a better understanding of **** as an organisation and the different departments and how they fit together. The depot visit was also very good. One now has a picture of the values, how they are structured and the downstream consequences of not living up to the. The Keys I will apply and use to analyse situations. And I also have an understanding of the **** culture.

- This has helped us in thinking about "how will one manage it (the change)?", "what is expected of me?" and that keeping your eye on the ball is the short term goal.

- The **** values stood out for me and I now understand the common goals of the company, acronyms and workflow. Depot visit was great. And one of the things I learnt was "Rather understand something than memorise it".

- Importance of shell brand and it's worth, me working for **** and keeping this up.

- How important ****'s Business Principles actually are. If you want to change a good organisation to a great organisation you need to know where you come from.

- O.P. organisation is beginning to fall into place – the cluster of businesses and what they do is crystallising. The Keys are important and can be used in daily life and the re-iteration of values and **** was great.

- I like the way values were put across and how important they are to the bottom line. It is important to me that they be lived. **** are very important and equally important is these being communicated to staff.

- You do have to live the values and not it's not always easy but it needs to be done.

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